DocAve® Online 3

User Guide

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What's New in the Guide

- Added information about enabling the Silverlight plugin (NPAPI plugin) in Google Chrome v42 or higher version.
- Added the Supported Cloud Storage Information section.
- Added the Integration with AvePoint Online Services section to provide new entries of AvePoint Online Services.

About DocAve Online

DocAve Online offers powerful backup, administration, and management capabilities through a Software as a Service (SaaS) platform, for organizations utilizing Microsoft Office 365 - SharePoint Online and Exchange Online. With DocAve Online, organizations can maintain the same level of control over their cloud-based assets as they experienced with on-premises solutions. Hosted on Microsoft Azure Web Services, on their Infrastructure as a Service (IaaS) offerings, DocAve Online empowers organizations to extend cloud computing as their specific business needs dictate by enabling: simplified user and permissions management, granular content protection and failover capabilities, on-demand content restructuring, user solutions and site elements deployment, customized reporting, and synchronization and publication of content across sites and mailboxes.

DocAve Online is available both commercially and for the U.S. Government Public Sector.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Browser and Silverlight Support Information

The following table provides the required browser versions and the required Silverlight version.

Browser	Version
Internet Explorer	IE 10 or above
Google Chrome	19.0.1084.52 or above
Mozilla Firefox	14.0.1 or above
Silverlight	5.0 or above

***Note**: Silverlight is a NPAPI plugin that is currently required to use DocAve Online. However, in Google Chrome v42 and later versions, NPAPI plugins are disabled by default. To use DocAve Online, you must manually enable NPAPI in Chrome. Complete the following steps to enable NPAPI:

1. Open Google Chrome.
2. In the address bar, enter **chrome://flags/#enable-npapi** and press **Enter** to access it.
3. Find the **Enable NPAPI** field and click **Enable**.
4. In the bottom of the page, click **Relaunch Now** to make your change take effect.

   ***Note**: The change will not take effect if you close and then open Google Chrome again. You must click **Relaunch Now**.

Supported Cloud Storage Information

The following table provides the supported types of cloud storage.

Storage
Microsoft Azure Storage
Amazon S3
Rackspace Cloud File
Dropbox
Box
OneDrive
TSM
SFTP
FTP

***Note**: For Microsoft Azure Storage, DocAve Online only supports writing backup data to the Block blobs storage type.

***Note**: Due to performance issues, AvePoint does not recommend using OneDrive for storage when using DocAve Online.

***Note**: DocAve Online supports specifying a folder in FTP/SFTP to store the data through configuring the **Folder Structure** field. This field is optional. In the **Root Folder** text box, enter the desired folder structure in FTP/SFTP where you would like to store the data (if the specified folder structure does not exist in FTP/SFTP, the folder structure will be created automatically). The data will be stored according to the specified folder structure. If you do not configure this field, the data will be stored in the FTP/SFTP root folder.

Integration with AvePoint Online Services

DocAve Online is integrated to AvePoint Online Services. To register for a DocAve Online account, you must first register an account in AvePoint Online Services. AvePoint provides the following methods to register an AvePoint Online Services account:

- Register on the AvePoint Online Services website.
- Visit the AvePoint Online Services page or the DocAve Online page on the AvePoint official website.
- To register for AvePoint Online Services for U.S. Government Public Sector, access the following URL: https://usgov.avepointonlineservices.com.

To access DocAve Online, use one of the entries above to sign in AvePoint Online Services. For details, refer to the AvePoint Online Services User Guide.

In DocAve Online, you can navigate back to the AvePoint Online Services homepage. Click the drop-down arrow ( ) on the top of the **Welcome** page and then click **AvePoint Online Services** on the navigation bar. You can also click **Governance Automation Online**, **Compliance Guardian Online**, or **File Share Navigator Online** to access the corresponding product.

AvePoint Online Services Versions: Commercial and U.S. Government Public Sector

There are two versions of AvePoint Online Services: AvePoint Online Services, and a version available on Microsoft's Cloud Platform for U.S. Government. The U.S. Government Public Sector version of AvePoint Online Services offers most of the same functionality as the Commercial version. For details, refer to the AvePoint Online Services User Guide. Functionality of DocAve Online in both versions is the same.

Before You Begin

Refer to the sections below to get started with DocAve Online.

Managing My Settings

Use My Settings to view and change your account information and the system language of your DocAve Online interface. To access **My Settings**, click the current login username in the top-right corner on the DocAve Online Home page. To edit the account information and language preference, click **Edit** on the ribbon, and the follow the instructions below:

- **Edit Information** – Enter the description for the current login user in the text box.
- **E-mail Address** – Enter the e-mail address in the text box. The account related notification e-mail will be sent to this e-mail address.
- **Language Preference** – Select the system language for your DocAve Online interface from the drop-down list; **English**, **Japanese**, or **French**.

Click **OK** on the ribbon to save you configurations, or click **Cancel** on the ribbon to cancel your changes.

To change the password of your account, go to the **My Profile** page in AvePoint Online Services. For details, refer to the AvePoint Online Services User Guide.

Registering Site Collection and Mailboxes

Registering site collections to SharePoint Sites groups and registering mailboxes to Exchange Mailboxes groups allows you to centrally manage and allocate your site collections/mailboxes.

When you access DocAve Online for the first time after registering the account, the **Register Sites and Mailboxes** pop-up window appears. It allows you to scan the site collections/mailboxes and to choose your desired site collections/mailboxes to register them in to the default or customized SharePoint Sites group/Exchange Mailboxes group.

To register site collections/mailboxes, complete the following steps in the **Register Sites and Mailboxes** pop-up window:

1. In **Office 365 Credentials**, specify your Office 365 credentials in the **Office 365 User ID** and **Password** text boxes. The SharePoint central admin URL is entered automatically according to your user ID. However, if you own your custom registered domain name, you can modify it. To scan all site collections and mailboxes in your domain, make sure the Office 365 user ID you specified has the **global administrator** role.

   In addition, you can select **Save as an Office 365 account profile**. For more information on Office 365 account profile, refer to Managing Office 365 Account.

2. Click **Next**. DocAve Online starts the scan. After the scan is finished, the **SharePoint Sites Group** section appears.

3. In **SharePoint Sites Group**, all available site collections are on the left **Site Collection** pane, and you can add your desired site collections to the default or customized SharePoint Sites group.

    - If you want to add all site collections to the default SharePoint Sites group, select the **Add all available site collections to the default group** checkbox, then click **Next** to add them to the **Default SharePoint Sites Group**.
    - If you want to add your desired site collections to a manually created SharePoint Sites group, select **Add site collections to customized groups**. Then refer to the following steps:

        i. On the left **Site Collection** pane, select your desired site collections by checking the corresponding checkboxes.

        To search your desired site collections, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the site collections with a URL that contains the entered keyword.

        ii. On the right **SharePoint Sites Group** pane, select your desired SharePoint Sites group by checking the corresponding checkbox. You can also perform the following actions:

            - To create a new SharePoint Sites group, click the plus sign (New) button and enter a SharePoint Sites group name in the text box, then click the checkmark ( ) button to create it.
            - To delete a SharePoint Sites group, select the SharePoint Sites group, then click the delete (Delete) button.
            - To search your desired groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups with a group name that contains the entered keyword.

        iii. Click **Add** on the ribbon or **Add>>** between the two panes to add the selected site collections to the selected SharePoint Sites group. Then the added site collections will not display in the left pane.

        To remove the site collections from the group, select the group to include all site collections, or expand the group to select the specified site collections. Then click **Remove** on the ribbon or **<<Remove** between the two panes to remove the site collections from the group.

        iv. Click **Next** to continue.

    Additional site collections can be added and reorganized after this wizard completes by accessing the DocAve Online Control Panel. For more details, refer to Managing SharePoint Sites.

When you are finished, click **Next**.

4. A window appears to allow you to choose whether to skip the next step. If you do not want to manage Exchange Online content with DocAve Online, AvePoint recommends you skip the **Exchange Mailboxes Group** section. Click **OK** to skip the next section, or click **Cancel** to go to the **Exchange Mailboxes Group** section and scan Exchange Mailboxes automatically.
5. In the **Exchange Mailboxes Group** section, all currently available mailboxes are on the left **Mailbox** pane, and you can add your desired mailboxes to the default or customized Exchange Mailboxes group.

    - If you want to add all mailboxes to the default Exchange Mailboxes group, select the **Add all available mailboxes to the default group** checkbox, then click **Next** to add them to the **Default Exchange Mailboxes Group**.
    - If you want to add your desired mailboxes to the default Exchange Mailboxes group or a manually created Exchange Mailboxes group, select **Add mailboxes to customized groups**. Then refer to the following steps:

        i. On the left pane, select your desired mailboxes by checking the corresponding checkboxes.

        To search your desired mailboxes, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the mailboxes whose address contains the entered keyword.

        ii. On the right **Exchange Mailboxes Group** pane, select your desired Exchange Mailboxes group by checking the corresponding checkbox. You can also perform the following actions:

            - To create a new Exchange Mailboxes group, click the plus sign (New Group) button and enter an Exchange Mailboxes group name in the text box, then click the checkmark ( ) button to create it.
            - To delete an Exchange Mailboxes group, select the Exchange Mailboxes group, then click the delete (Delete) button.

        iii. Click **Add** on the ribbon or **Add>>** between the two panes to add the selected mailboxes to the selected Exchange Mailbox group. Then the added mailboxes will not display in the left pane.

        To remove the mailboxes from the group, select the group to include all mailboxes, or expand the group to select the specified mailboxes. Then click **Remove** on the ribbon or **<<Remove** to move the mailboxes from the group to the left pane.

        iv. Click **Next** to continue.

Additional mailboxes can be added and reorganized after this wizard completes by accessing the DocAve Online Control Panel. For more information, refer to Managing SharePoint Sites.

When you are finished, click **Next**. The **Overview** section appears.

6. Review your configurations in the previous steps.
7. Click **Finish** to complete the registration.

Products in DocAve Online

The following DocAve products are available in DocAve Online:

- **Granular Backup & Restore** – A fast, flexible, and intelligent backup solution for Microsoft SharePoint. DocAve Online provides full fidelity backup and recovery, from a site collection/My Site down to an individual item, while maintaining all metadata, security, and version history. DocAve Online Granular Backup and Restore supports restoring the contents to your storage, so you can access your content even if your SharePoint Online environment goes down. For full details and guidelines about using Granular Backup & Restore, refer to the Granular Backup and Restore User Guide.

  ***Note**: If the DocAve Online Agent service gets restarted, the Granular Backup and Restore jobs that were running may fail due to the timeout. DocAve Online will rerun the timeout jobs again once the Agent service is restarted.

- **Administrator** – Gives organizations universal control over their enterprise-wide SharePoint landscape. Administrator simplifies the implementation and enforcement of SharePoint access and content provisioning governance policies. Administrator offers the most comprehensive solution to meet any organization's SharePoint management and administrative needs. For full details and guidelines about using Administrator, refer to the Administrator User Guide.

  ***Note**: If the current usage of your Policy Enforcer Database exceeds 80% of the total provided space, you will receive an e-mail notification from the DocAve Online team to inform you to free up space. For details on Policy Enforcer Database limitations and best practices on how to maintain records and manage your consumption, refer to Appendix D: Functional Limitations.

- **Content Manager** – Allows the seamless migration of content from one location to another with no backup needed. Content Manager allows the user to comprehensively move, copy, and restructure the content and topology of SharePoint environment easily and accurately. For full details and guidelines about using Content Manager, refer to the Content Manager User Guide.

- **Deployment Manager** – Improves IT efficiency by automating SharePoint Online implementation from staging to production. Deployment Manager automates the change management of user solutions, customizations, and site elements, thereby:

  Minimizing human error and cost overruns

  Facilitating pre-production testing and deployment operations

  For full details and guidelines about using Deployment Manager, refer to the Deployment Manager User Guide.

- **Replicator** – Keeps content synchronized across one or more SharePoint Online instance. Replicator can operate within SharePoint Online sites of the same Office 365 account, or between SharePoint Online sites of one Office 365 account to those of another Office 365 account. For full details and guidelines about using Replicator, refer to the Replicator User Guide.

- **Report Center** – Reports on user lifecycle, item lifecycle, site actions, list deletion events, permission changes, content type changes, or reports according to the customized filters from the collected audit records. To generate these reports, users are required to apply the audit rules and retrieve audit data for the SharePoint Online objects. DocAve Online Report Center also generates the Configuration Reports to report on the configuration details and the statistics for the selected scope. For full details and guidelines about using Report Center Audit Reports and Configuration Reports, refer to the Report Center User Guide.

  ***Note**: If the current usage of your Auditor Database exceeded 80% of the total provided space, you will receive an e-mail notification from the DocAve Online team to inform you to free up space. For details on the Auditor Database limitations and best practices on how to maintain records and manage your consumption, refer to Appendix D: Functional Limitations.

  ***Note**: DocAve Online will automatically prune Compliance Reports ten days old from the Report database. If a report was generated on the 1st of the month, the data will be pruned on the 11th.

- **Archiver** – Deletes dormant content (from items to sites) based on fully-customizable business rules or an on-demand basis tiered storage management and the support of backup and recovery.

The following product is specific to DocAve Online:

- **Exchange Online Backup and Restore** - A fast, flexible, and intelligent backup solution for Microsoft Exchange. DocAve provides full fidelity backup and recovery, from a mailbox down to an individual item, while maintaining all forms, types, and metadata. For full details and guidelines about using Exchange Online Backup and Restore, refer to Exchange Online Backup and Restore.

  ***Note**: If the DocAve Online Agent service gets restarted, the Exchange Online Backup and Restore jobs that were running may fail due to the timeout. DocAve Online will rerun the timeout jobs again once the Agent service is restored.

The following DocAve products are available in DocAve Online for configuring the DocAve Online settings and view job information:

- **Control Panel** – The central interface of managing DocAve Online and how it interacts with your SharePoint/Exchange Online environment. Control Panel is also integrated into other products, which enables you to configure relevant settings without having to leave the interface of the product you are using. For full details and guidelines about using the Control Panel, refer to the Control Panel Reference Guide.

- **Job Monitor** – Allows you to view the status or details of jobs, download reports, and manage the job all from a central interface. Job Monitor is also integrated into other products, which enables you to manage the jobs inside its corresponding products with additional features specific to the product itself. For full details and guidelines about using Job Monitor, refer to the Job Monitor Reference Guide.

***Note**: DocAve Online supports the **Job Queue** feature to view and manage the jobs waiting in queue. If the number of the running jobs in DocAve Online exceeds the resource limitation, the jobs will be waiting and displayed in the **Job Queue** list. The **Promote** action promotes any selected waiting job to the top. The **Delete** action deletes the selected waiting jobs from the queue.

For details on the supported and unsupported features for these DocAve products, refer to Appendix A: Supported and Unsupported Features for DocAve Products.

Features Specific to DocAve Online Product Modules

The features included in this section are specific to the DocAve Online product modules. Any features included in this section are not supported in the DocAve on-premises version of the modules and are included here to provide helpful information about using these features.

Administrator

The following feature is specific to DocAve Online Administrator.

Using GB as Unit Value of Storage Quota in Site Collection

DocAve Online supports using GB as the unit value of the storage quota when creating a new site collection.

Using User Type to Facilitate Security Search

User Type allows you to define the user types that can be searched out by using the **Security Search**.

To use this function, complete the following steps:

1. Select one node from the tree, and then click the **Security** tab.
2. Click **Security Search** on the ribbon, and select **Security Search Wizard Mode** or **Security Search Form Mode.**
3. The **User Type** option appears in the interface of the Security Search settings. Click the drop-down list and then select the user types.
    a. **External User** – Search the users out of SharePoint.
    b. **Guest Links** – Search URL information of the Anonymous Access.
    c. **SharePoint User/Group** – Search the existing users/groups in SharePoint.
4. Configure other settings for **Security Search**.

Searching Nodes Using the Advanced Search Feature

DocAve Online Administrator provides the **Advanced Search** feature on **Sites**, **Lists**, or **Folders** nodes on the scope tree. Using this feature, users can narrow down the search criteria and display fewer nodes. To search nodes using the **Advanced Search** feature, complete the following steps:

1. Right-click the node and then select **Advanced Search**.
2. In **Advanced Search** click **Add a Criterion** and configure the following settings:
    a. **Rule** – Select the rule you wish to search. You can use the **URL** rule and the **Name** rule to filter site/list/library/folder level nodes.
    b. **Condition** – Select the condition for the rule from the drop-down list.
    c. **Value** – Enter the value for the rule in the text box.

d. To add additional criteria, click **Add a Criterion**, and repeat the steps above. You can change the logical relationships between the criteria by clicking the **And** or **Or**. By default, the logical relationship is set to **And**.

    - **And** means that the child nodes that meet all of the criteria will be included in the result.
    - **Or** means that the child nodes that meet any criterion will be included in the result.

    The **Basic Filter Condition** area displays the logic relationships of the filter criteria.

3. Click **Search** to start searching the child nodes.

Importing Custom Site Collection Template Solution File

When creating a site collection using the **New Site Collection** feature, you can import a custom template solution (.wsp) file that will be used to create the site collection.

1. In the **New Site Collection** window, go to the **Template Selection** field and click the **Custom** tab.
2. Click **Browse** to select your desired .wsp file in the **Open** window.

Policy Enforcer Rules for Security Groups/Active Directory Federation Services (ADFS) Groups

DocAve Online Policy Enforcer supports the ability to establish limitations for certain actions and changes that have occurred in SharePoint Online environments.

DocAve Online Administrator Policy Enforcer supports checking for security groups/ADFS Groups in the following rules:

- Content Creation/Content Upload
- Grant, Revoke and/or Modify Permissions Privilege
- Delete
- Move
- Copy

Deleting SharePoint Online Security Group

To delete a SharePoint Online security group, select a site collection/site, and navigate to **Security** > **Users and Permissions** > **People and Groups**, and then complete the following steps:

1. Click **Groups** to display all of the groups.
2. Click **Edit** beside the security group that you want to delete. In the **Change setting for:** page, you will see the security group name.
3. Click **Delete** in the bottom-right corner of the page to delete the security group.

Configuring Site Level Tree View Settings in Batch

To configure site level tree view settings in batch, select more than one site, and navigate to **Configuration** > **Tree View**, and then complete the following steps:

1. Configure the Quick Launch in batch.
    - Select the **Enable Quick Launch** checkbox to configure the Quick Launch in batch.
    - Click **Edit for individual objects**.
        - Click **Show All Applied Sites** to view the selected sites.
        - Select the **Enable Quick Launch** checkbox to display the Quick Launch on the site.
        - Deselect the **Enable Quick Launch** checkbox to not display the Quick Launch on the site.
        - Click **OK** to save the configurations.
    - Click **Set all to default** to set the individual settings to the default ones.
2. Configure the Tree View in batch.
    - Select the **Enable Tree View** checkbox to configure the Tree View in batch.
    - Click **Edit for individual objects**.
        - Click **Show All Applied Sites** to view the selected sites.
        - Select the **Enable Tree View** checkbox to display the Tree View on the site.
        - Deselect the **Enable Tree View** checkbox to not display the Tree View on the site.
        - Click **OK** to save the configurations.
    - Click **Set all to default** to set the individual settings to the default ones.

Granular Backup & Restore

The following features are specific to DocAve Online Granular Backup & Restore.

***Note**: If a SharePoint Online site collection has been deleted, the deleted site collection will be skipped for backup and will not be recorded in the backup job report.

List View

To configure List View settings, navigate to **Ad Hoc Backup** > **Default Settings** > **List View**, or **Plan Builder** – **Wizard Mode** > **Advanced/Plan Builder** – **Form Mode** > **List View**.

Select the **Include list view** checkbox to back up the list views in the Granular Backup job.

Configuring Information Rights Management Settings

To configure Information Rights Management Settings, navigate to **Ad Hoc Backup** > **Default Settings** > **Information Rights Management Settings**, or **Plan Builder – Wizard Mode** > **Advanced/Plan Builder – Form Mode** > **Information Rights Management Settings**.

If the Information Rights Management Settings are enabled in SharePoint Online and the **Disable Information Rights Management (IRM) Settings** checkbox is:

- Selected, IRM Settings will be disabled temporarily on the individual list/library while it is being backed up and re-enabled once the operation on this list/library is complete.
- Deselected, the content you backed up will remain encrypted, and the restored backup data can only be functional in the destination when the Granular in place restore is performed.

  ***Note**: If the source list/library is completely deleted from SharePoint Online, the restored backup data cannot be accessed through SharePoint Online after the in place restore.

Restoring a Storage Policy

To restore the granular content at list/library/folder/item/file level to the designated storage policy, navigate to **Granular Backup and Restore** > **Restore** and complete the following steps:

1. In **Restore** tab, select **Restore** on the ribbon.
2. In the **Job Selection** interface, select the backup job that contains the granular content that you want to restore. Click **Next**. The **Data Selection** interface appears.
3. Expand the **Backup Data** tree to select the desired SharePoint Online lists/libraries/folders/items/files on the tree. Click **Next**.

   ***Note**: If you select the **Only restore security** option in Global settings for content configuration field to only restore the security of the selected contents, **Restore to storage policy** will be disabled.
4. In the **Restore Type** interface, select **Restore to storage policy** to restore the selected lists/libraries/folders/items/files.
5. Select a previously created storage policy as the destination to store the restored granular content, or select **New Storage Policy** from the drop-down list to create a new storage policy for the restored granular content.

Click **Next**. For the rest of the settings in the **Restore** wizard, refer to Granular Backup and Restore User Guide. ***Note**: The default storage, Microsoft Azure Storage, cannot be used to perform the restore. You must configure your own storage. Refer to Configuring Devices and Setting up Storage Policies for more information on how to configure a device.

Apps Conflict Resolution

In DocAve Online, Granular Restore supports **Skip** and **Overwrite** as the **Apps conflict resolution**. To configure the Apps conflict resolution, navigate to **Granular Restore** > **Restore** > **Restore Settings**.

In **Conflict Resolution** of the **Restore Settings** step, you can select **Skip** or **Overwrite** from the **Apps conflict resolution** drop-down list.

- **Skip –** If the apps in the source and destination conflict, the destination app and AppData will remain unchanged.
- **Overwrite** – If the apps in the source and destination conflict, the destination app and AppData will be removed, an app in the latest version will be downloaded and installed from app store, and the backed up AppData will be restored to the destination.

Restoring a Thread

To configure a restore thread setting, navigate to **Granular Restore** > **Restore** > **Restore Settings**. In the **Restore Thread** files, you can choose to use a single thread or multiple threads during restore.

- **Single thread** − A single thread is used during restore.
- **Multiple thread** − Multiple threads are used during restore.

Importing Custom Site Collection Template Solution File

When creating a site collection on the destination tree for an out of place restore, you can import a custom template solution (.wsp) file to create the site collection with custom template.

1. In the **Create Container** window, go to **Template Selection** and click **Custom** tab.
2. Click **Browse** to select your desired .wsp file in the **Open** window.

Ignoring the Differences of Columns and Content Types, and Restoring the Items

DocAve Online Granular Backup and Restore provides a new conflict resolution for dependent items if you choose to restore the item dependent columns and content types to maintain item integrity.

When building a Granular Restore job, you can select **Ignore the differences of columns and content types, and restore the items** from the drop-down list in the **Item Depended Columns and Content Types** field in **Restore Settings**. With this option selected, the conflict of columns and content types will be ignored and the dependent items will be restored to the destination.

Retrying the Retention Job

If the retention job to move the Granular Backup data from the SFTP storage to a FTP storage is finished with exception, the retention job will be retried automatically.

Deployment Manager

The following features are specific to DocAve Online Deployment Manager.

Ignoring the Differences of Columns and Content Types, and Deploying the Items

In **Deployment Manager** > **Online Deploy** interface, select a folder or an item in the source and then select a folder in the destination, or if you select a root folder and select a list or root folder in the destination, and click **Add to Queue**. A new conflict resolution for dependent items is in the **Configuration** field.

Select **Deploy the item-dependent columns and content types to maintain item integrity**, then you will see **Ignore the differences of columns and content types, and deploy the items** in the **Conflict resolution for dependent items** drop-down list. With this option selected, the conflict of columns and content types will be ignored and the dependent items will be deployed to the destination.

Save Mapping and Run Immediately in Queue Tools

In the **Queue Tools** interface, click **Save** on the ribbon after editing a mapping. A drop-down list appears.

- **Save Mapping** – Select this option to save the mapping and settings.
- **Save** – Select this option to save the mapping and settings. Then, exit the **Queue Tools** interface.
- **Save and Run Now** – Select this option to save the mapping and settings, run the plan immediately, then exit the **Queue Tools** interface.

Replicator

The following features are specific to DocAve Online Replicator.

Information Rights Management Settings

To configure the Information Rights Management Settings, navigate to **Profile Settings** > **Advanced Options** > **Information Rights Management Settings**.

If the Information Rights Management Settings are enabled in SharePoint Online and the **Disable Information Rights Management (IRM) Settings** checkbox is:

- Selected, IRM Settings will be disabled temporarily on the individual list/library while it is being replicated and re-enabled once the operation on this list/library is complete.
- Deselected, Replicator does not work with the IRM Settings enabled library/list and the library/list cannot be replicated.

Restoring a Thread

To configure Restore Thread, navigate to **Profile Settings** > **Advanced Options** > **Restore Thread**.

- **Single thread** – A single thread is used during restore.
- **Multiple threads** – Multiple threads are used during restore.

Ignoring the Differences of Columns and Content Types, and Replicating the Items

DocAve Online Replicator provides a new conflict resolution for dependent items if you choose to replicate the item dependent columns and content types to maintain item integrity.

1. Navigate to **Profile Settings** > **Replication Options** > **Configuration** > **Advanced**.
2. Select the **Deal with the item-dependent column and content types** checkbox.
3. Choose **Replicate the item-dependent columns and content types to maintain item integrity**.

4. In the **Conflict resolution for dependent items** drop-down list, you can see a new resolution **Ignore the differences of columns and content types, and replicate the items**. With this option selected, the conflict of columns and content types will be ignored and the dependent items will be replicated to the destination.

Importing Custom Site Collection Template Solution File

When creating a site collection on the destination tree, you can import a custom template solution (.wsp) file that will be used to create the site collection.

1. In the **Create Container** window, go to **Template Selection** and click the **Custom** tab.
2. Click **Browse** to select your desired .wsp file in the **Open** window.

Content Manager

The following features are specific to DocAve Online Content Manager.

Configuring Detailed Settings

To configure detailed settings for Configuration, navigate to **Default Copy Settings**/**Default Move Settings**/**Plan Builder – Wizard Mode** > **Data Selection**/**Plan Builder – Form Mode** > **Configuration**. Select the **Copy configuration**, **Move configuration**, or **Copy/Move configuration** checkbox, then select the configurations that you want to copy or move.

- **Site Collection Level** – Site collection features and properties.
- **Site Level** – Site features and properties, Site column and content type, Navigation and quick launch, Site template and list template, Web parts, page layout, master pages and other hidden lists.
- **List Level** – List settings and Public views.

Choose one of the following options to deal with the item-dependent columns and content types:

- **Copy/Move the item-dependent columns and content types to maintain item integrity.**

  With this option selected, choose one of the following conflict resolutions for dependent items to deal with the conflict:

  - **Do not copy/move the columns and content types, or the corresponding items**
  - **Overwrite the columns and content types**
  - **Append the columns and content types to destination**
  - **Ignore the difference of columns and content types, and copy/move the items**
- **Do not copy/move the item-dependent columns or content types. Report the items if the corresponding column or content type is not found in destination.**

Configuring Detailed Settings for Security

To configure detailed settings for Security, navigate to **Default Copy Settings/Default Move Settings/Plan Builder – Wizard Mode** > **Data Selection/Plan Builder – Form Mode** > **Security**. Select the **Copy security**, **Move security** or **Copy/Move security** checkbox, and then select the securities that you want to copy or move:

- **Site Collection Level** – Users, groups.
- **Site Level** – Users, groups, permission levels, site permissions. **Permission levels** enable you to replicate customized permission levels from the source to the target properly.
- **List Level** – Users, groups, list permissions.
- **Folder Level** – Users, groups, folder permissions.
- **Item Level** – Users, groups, item permissions.

Configuring Information Rights Management Settings

To configure Information Rights Management Settings, navigate to **Default Copy Settings/Default Move Settings/Plan Builder – Wizard Mode** > **Data Selection/Plan Builder – Form Mode** > **Information Rights Management Settings**.

If the Information Rights Management Settings are enabled in SharePoint Online and the **Disable Information Rights Management (IRM) Settings** checkbox is:

- Selected, IRM Settings will be disabled temporarily on the individual list/library while it is being copied or moved and re-enabled once the operation on this list/library is complete.
- Deselected, Content Manager does not work with the IRM Settings enabled library/list and the library/list cannot be copied or moved.

Configuring Apps Conflict Resolution

To configure apps conflict resolution, navigate to **Default Copy Settings/Default Move Settings/Plan Builder – Wizard Mode** > **Data Selection/Plan Builder – Form Mode** > **Conflict Resolution** > **Apps conflict resolution**.

- **Skip** – If the apps in the source and destination conflict, the conflict will be skipped. The destination app and AppData will remain unchanged.
- **Overwrite** – If the apps in the source and destination conflict, the destination app and AppData will be removed, an app in the latest version will be downloaded and installed from app store, and the backed up AppData will be restored to the destination.

Preserving Modified By and Modified Time

To configure Preserve Modified By and Modified Time settings, navigate to **Default Copy Settings/Default Move Settings/Plan Builder – Wizard Mode** > **Data Selection/Plan Builder – Form Mode** > **Preserve Modified By and Modified Time**.

Select **Yes** to preserve the source documents' column value of **Modified By** and **Modified** when copying or moving documents to the destination. Otherwise, select **No**.

***Note**: This option only affects the destination library when **Create major and minor (draft) versions** is enabled.

Importing Custom Site Collection Template Solution File

When creating a site collection on the destination tree, you can import a custom template solution (.wsp) file that will be used to create the site collection.

1. In the **Create Container** window, go to **Template Selection** and click **Custom**.
2. Click **Browse** to select the .wsp file in the **Open** window.

Job Monitor

The following feature is specific to DocAve Online Job Monitor.

Job Queue

DocAve Online supports the **Job Queue** feature to view and manage the jobs waiting in queue. If the number of the running jobs in DocAve Online exceeds the resource limitation, the jobs will be waiting and displayed in the **Job Queue** list. All of the Run Now jobs and the scheduled jobs (when the scheduled time is met) will be calculated by the resource limitation. Then the Run Now job and the scheduled jobs designated to execute will be added to waiting jobs displaying in the **Job Queue** list.

To manage the waiting jobs in **Job Queue**, perform any of the following actions:

- Refresh the Job Queue interface – Click the **Refresh** button on the ribbon to get the most up-to-date information on the waiting jobs.
- Filter the waiting jobs – Click **Product** on the ribbon, and then select/deselect the product name as you desire to display the jobs of the selected products.
- Promote the waiting jobs – Select a waiting job, and then click **Promote** on the ribbon to promote the selected waiting job to the top.
- Delete the waiting jobs – Select one or more waiting jobs, and then click **Delete** to delete the selected waiting jobs from the queue.

Copying Job ID

DocAve Online Job Monitor supports copying the job ID of a specific job. To copy a job ID, right-click the job ID and click **Copy Job ID**. The job ID is copied to your clipboard, and you can paste the job ID to your desired location.

Control Panel

The following features are specific to DocAve Online Control Panel.

Viewing Storage Usage of Each Plan in Physical Device

To view the storage usage of each plan, complete the following steps:

1. Navigate to **Control Panel** > **Physical Device**.
2. Select a physical device and click **View Details** on the ribbon.
3. On the **Data** tab, click **View Details** under the **Actions** column for your desired module.
4. In the new window, the storage usage of each plan is displayed under the **Data Size** column.

Deleting Exchange Online Data from the Default Physical Device

To delete the data that was backed-up by an Exchange Online Backup & Restore plan, together with the plan's related job records and job reports, complete the following steps:

1. Navigate to **Control Panel** > **Physical Device**.
2. Select **Default Physical Device** and click **View Details** on the ribbon.
3. On the **Data** tab, click **View Details** under the **Actions** column of the **Exchange Online Backup** module.
4. For the plan that contains the data you are about to delete, click **Delete All Data**. A pop-up window appears to ask you to confirm your deletion. All of the data that was backed-up by the plan, and all of the job records and job reports related to this plan will be deleted.

   You can also select the **Remove the DocAve Online plan as well.** checkbox to delete this plan from DocAve Online during the data deletion.

5. Click **OK** to delete the data.

Deleting SharePoint Online Data from the Default Physical Device

To delete the SharePoint Online data that was backed-up by a Granular Backup plan, together with the plan's related job records and job reports, complete the following steps:

1. Navigate to **Control Panel** > **Physical Device**.
2. Select **Default Physical Device** and click **View Details** on the ribbon.
3. On the **Data** tab, click **View Details** under the **Actions** column of the **Granular Backup** module.
4. For the plan that contains the data you are about to delete, click **Delete All Data**. A pop-up window appears to ask you to confirm your deletion. All of the data that was backed-up by the plan, and all of the job records and job reports related to this plan will be deleted.

   You can also select the **Remove the DocAve Online plan as well.** checkbox to delete this plan from DocAve Online during the data deletion.

5. Click **OK** to delete the data.

French is Available for Mapping

DocAve Online supports French for mapping. To select French as the language that the source node is displayed in or as the language that you want to display the destination node in, navigate to **Control**

Panel > **Language Mapping**, on the **Create a New Language Mapping**/**Edit Language Mapping** interface, select **French** from the **Source language** drop-down list or the **Target language** drop-down list.

Archiver

The following features are specific to DocAve Online Archiver.

Archiving and Restore List Views

In the **Archiver** tab of DocAve Online Archiver, selecting the **Include list views** checkbox in the **List View** field of the **Settings** pane allows you to archive list views in the selected node.

To restore the archived list views, perform an in place restore with the **Include list views** checkbox in the **List View** field selected in the **Restore Settings** step.

Performing an Out of Place Restore

Refer to the following steps to perform an out of place restore:

1. Navigate to **Archiver** > **Archiver Restore**. The **Archiver Restore** tab appears.
2. In **Data Selection**, select the archived data from the tree structure that you want to restore.

   ***Note**: This type of restore only supports restoring data in list, folder, and item levels.
3. After selecting the archived data to restore, click **Next**. The **Restore Type** page appears.
4. In **Restore Type**, configure the following settings:
   - **Restore Type** – Select **Out of place restore** to restore the archived data to the logical device in the storage policy selected below.
   - **Destination** – Select one of the configured storage policies for the archived data from the drop-down list, or select **New Storage Policy** to create a new one.

     ***Note**: The **Destination** field only appears after you select the **Out of place restore** in the **Restore Type** field.
5. Click **Next** to access the **Restore Settings** page.
6. In **Restore Settings**, configure the following settings:
   - **Notification** – Configure e-mail notification settings. Select the desired notification profile from the drop-down list.
   - **Schedule Settings** – Select when to restore the archived data.
     - **Restore once the wizard finished** – Run the restore job immediately after you have finished using the wizard.
     - **Start time** – Configure a schedule yourself and choose a start time. Click the link below the start time to switch the time zone.
7. When finished, click **Next**. The **Overview** page appears.

8. **In the Overview** page, review your selections. Click **Edit** beside the row you want to edit to open the corresponding settings page.
9. Confirm all the configurations and click **Finish**.

Report Center

The following feature is specific to DocAve Online Report Center.

Reporting on SharePoint Online Site Collections for Sharing Outside Your Company

DocAve Online Configuration Report supports reporting for Sharing Outside Your Company on SharePoint Online site collections. Refer to the following steps to run the Configuration Report on the Sharing Outside Your Company information:

1. Navigate to **Administration Report** > **Configuration Reports**.
2. In the **Scope** configuration area, click on a group to expand the data tree and select one or more site collections.
3. In the **Please configure report setting** area, click **General Settings** and select the **Sharing Outside Your Company** option.

   ***Note**: Reporting on Sharing Outside Your Company is only available on the site collection level.
4. For details on configuring a Configuration Report profile and running a Configuration Report, refer to the Report Center User Guide.

Managing SharePoint Sites

Use **SharePoint Sites** to register SharePoint Online sites to DocAve Online in order for those sites to be managed by DocAve Online. You can also manage SharePoint Sites groups. A SharePoint Sites group is a collection of registered SharePoint Online site collections, which allows you to centrally manage and allocate your SharePoint Online sites.

To access the **SharePoint Sites** tab for DocAve Online, complete the following steps:

1. In the Control Panel interface, click **SharePoint Sites** under the Office 365 Settings heading.
2. When finished with the SharePoint Online sites management, click **Cancel** on the ribbon to close the **SharePoint Sites** page.

Working with the SharePoint Sites Tab

With the **SharePoint Sites** tab activated, perform the actions on the ribbon according to your requirements. The buttons in the **Site Collection Registration Mode** group are mainly used to choose the method of adding site collections to SharePoint Sites group.

- **Scan Mode** – Scan site collections to add to SharePoint Sites groups.
- **Batch Import** – Import site collections in batch to add to SharePoint Sites groups.
- **Single Site Collection** – Add site collections one by one to SharePoint Sites groups manually.

The buttons in the **Site Collection Management** group are mainly used to manage the SharePoint Online sites and SharePoint Sites group.

- **Reconnect** – When the site collections added in the SharePoint Sites group fail to connect, reconnect them by specifying your Office 365 credentials.
- **New Group** – Create a new SharePoint Sites group.
- **Delete** – Delete the selected SharePoint Sites groups.

The following buttons in the **Actions** group are used mainly to manage SharePoint Online sites:

- **Add** – Add the selected site collections on the left pane to the selected SharePoint Sites group on the right **SharePoint Sites Group** pane.
- **Remove** – Remove the site collections from the selected SharePoint Sites group.
- **Scan** – Scan the site collections in your SharePoint Online. The available site collections are displayed on the left **Site Collection** pane.

Registering Site Collections by Scan

Registering site collections to SharePoint Sites groups allows you to centrally manage and allocate your SharePoint Online sites after scanning site collections. To register site collections you need to:

1. Scan the site collections in your SharePoint Online.
2. Add the desired site collections to the selected SharePoint Sites groups.

To start registering site collections to SharePoint Sites groups, complete the following steps:

1. With **SharePoint Sites** activated, click **Scan Mode** in the **Site Collection Registration Mode** group on the ribbon and then click **Scan** in the **Actions** group, or you can click **Scan** on the left **Site Collection** pane. A pop-up window appears.
2. On the pop-up window, specify your Office 365 credentials by selecting an authentication profile or enter the corresponding information. To scan all site collections in your domain, make sure the Office 365 user ID you specified has the **global administrator** role.
    - **Select an authentication profile** – Select an authentication profile from the drop-down list. For more information of authentication profile, refer to Managing Office 365 Account.
    - **Provide the credentials** – Enter your Office 365 credentials. You can select **Save as an authentication profile** to save the entered information as an authentication profile.
3. Click **Connect** to connect to your SharePoint Online.
4. After connecting successfully, DocAve Online automatically starts to scan the site collections in SharePoint Online. All available site collections are displayed on the **Site Collection** pane after scanning. The site collections that have been registered to your SharePoint Sites groups will not display.
5. On the **Site Collection** pane, find your desired site collections, and then select the checkboxes next to the site collection URL. You can also perform the following actions:
    - To select all site collections, select the **Select All** checkbox.
    - To search for the site collections, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the site collections whose URL contains the entered keyword.

      Note**: The search box supports wildcards (**?** and ***). **?** represents a character and * represents multiple characters. For example, enter **?abc to search the site collections whose URLs start with an unknown character and have multiple unknown characters after **abc**.
6. On the **SharePoint Sites Group** pane, select a SharePoint Sites group. You can also perform the following actions:
    - To create a new SharePoint Sites group, click the plus sign (New Group) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark ( ) button to save this new group.

- To search for SharePoint Sites groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.

  Note**: The search box supports wildcard (**?** and **) to search for the site collections under the SharePoint Sites groups. **?** represents a character and ***** represents multiple characters. For example, enter **?abc*** to search the site collections whose URLs start with an unknown character and have multiple unknown characters after **abc**.

- To delete SharePoint Sites groups, select the groups and then click **Delete** on the ribbon or the delete (Delete) button to delete the selected groups. The site collections added to the group will be moved to the **Site Collection** pane.

7. Click **Add** on the ribbon or **Add>>** between the two panes to add the selected site collections to the selected SharePoint Sites group. The added site collections will not display in the left pane.

   To remove the site collections from the group, select the group to include all site collections or expand the group to select the specified site collections and then click **Remove** on the ribbon or **<<Remove** to move the site collections from the group to the **Site Collection** pane.

8. Click **Save** to save changes and complete the process of registering site collections. To cancel your changes, click **Cancel**.

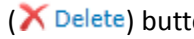
Registering Site Collections in Batch by Configuration File

To register site collections to a specified SharePoint Sites group in batch by using a configuration file, download a configure file template first. Then provide the site collection information in the file, import the file, and register site collections to the specified SharePoint Sites group.

1. With the **SharePoint Sites** tab activated, click **Batch Import** on the ribbon.
2. Click **Download Template** on the ribbon.
3. In the pop-up window, select a location to save the **Import_SiteCollection_Template.xls** file. You can modify the file name according to your requirements.
4. Open the configuration file and enter the URL of the site collections under the **Site Collection** column.
5. Save changes to the file and close it.
6. **Upload your site collection template** – On the left pane of the **SharePoint Sites** page, upload the template by clicking **Browse**.
7. **Username** and **Password** – Specify your Office 365 credentials that have access to all site collections.

   ***Note:** The user specified here must be the administrator for all site collections or own the **global administrator** role. If DocAve discovers that the specified user does not have access to any site collection, a message will pop up to let you choose whether to import this kind of site collection. Though this kind of site collection can be imported and registered to the selected

group successfully, they cannot be managed via DocAve Online. You can reconnect to this kind of site collections later. Find more information in Reconnecting Site Collections.

8. Select a SharePoint Sites group on the **SharePoint Sites Group** pane. You can also perform the following actions:
    - To create a new SharePoint Sites group, click the plus sign ( ) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark () button to save this new group.
    - To search for the SharePoint Sites groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.
    - To delete the SharePoint Sites groups, select the groups and then click **Delete** on the ribbon or the delete () button to delete the selected groups. The site collections added to the group will be moved to the **Site Collection** pane.
9. Click **Add** on the ribbon or **Add>>** between the two panes to add the site collections in the file to the selected SharePoint Sites group.

    To remove the site collections from the group, select the group to include all site collections or expand the group to select the specified site collections and then click **Remove** on the ribbon or **<<Remove** to remove the site collections from the group to the **Site Collection** pane.
10. Click **Save** to save changes and complete the process of registering site collections. To cancel your changes, click **Cancel**.

Registering a Single Site Collection

Registering a single site collection to SharePoint Sites groups allows you to add your desired site collection to SharePoint Sites groups one by one fast and conveniently. To add a single site collection to your desired SharePoint Sites groups manually, complete the following steps:

1. With SharePoint Sites activated, click **Single Site Collection** in the Site Collection Registration Mode group on the ribbon.
2. Enter the **Site Collection URL**, **Username**, and **Password** in the left pane. Make sure the user you specified has **Site Collection Administrator** permissions to the specified site collection.
3. In **SharePoint Sites Group**, select a SharePoint Sites group. You can also perform the following actions:
    - To create a new SharePoint Sites group, click the plus sign ( ) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark () button to save this new group.
    - To search for the SharePoint Sites groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.

- To delete the SharePoint Sites groups, select the groups and then click **Delete** on the ribbon or the delete ( ) button to delete the selected groups. The site collections added to the group will be moved to the **Site Collection** pane.

4. Click **Add** on the ribbon or **Add>>** between the two panes to add the specified site collection to the selected SharePoint Sites group. The added site collection will not display in the left pane.

   To remove the site collection from the group, select the group to include all site collections or expand the group to select the specified site collections and then click **Remove** on the ribbon or **<<Remove** to move the site collections from the group to the **Site Collection** pane.

5. Click **Save** to save changes and complete the process of registering site collections. To cancel your changes, click **Cancel**.

Reconnecting Site Collections

If DocAve Online cannot connect to the site collections that have been registered to SharePoint Sites group, then they will not be managed via DocAve Online. When this happens, you can reconnect the site collections. When loading the **SharePoint Sites** page, DocAve Online will automatically check whether all registered site collections can be connected or not. If it fails to connect some site collections, a message will appear under the ribbon. You can choose to perform:

- Click **Clear All** to remove the unconnected site collections from the SharePoint Sites groups.
- Reconnect the site collections.
  i. With the **SharePoint Sites** tab activated, expand the SharePoint Sites group to find the site collections whose URL is greyed out.
  ii. Click the reconnect ( ) button next to the site collection URL.
  iii. On the **Site Collection Connection** pop-up window, specify your Office 365 user ID and password.
  iv. Click **Connect** to reconnect the site collection.

If the password of your Office 365 account has been changed, select the site collections registered by this Office 365 account and click **Reconnect** on the ribbon. On the **Site Collection Connection** pop-up window, enter your Office 365 user ID and the latest password, and then click **Connect**.

Managing SharePoint Sites Groups

A SharePoint Sites group is a collection of registered SharePoint Online site collections that allows you to centrally manage and allocate your SharePoint Online sites. You can perform the following actions in the **SharePoint Sites** page to manage your groups:

- **New Group**– Create a new SharePoint Sites group.

- **Delete** – Delete the selected SharePoint Sites groups.

Creating a SharePoint Sites Group

To create a new SharePoint Sites group, complete the following steps:

1. In the **SharePoint Sites** page, click **New Group** on the ribbon or the plus sign (

) button on the **SharePoint Sites Group** pane.
2. Enter a group name in the text box.
3. Click the checkmark ( ) button to save this new group.
4. Repeat steps from 1 to 3 to create new groups.

Deleting SharePoint Sites Groups

To delete a SharePoint Sites group, complete the following steps:

1. In the **SharePoint Sites** page, select the groups you want to delete on the **SharePoint Sites Group** pane. To delete all groups, select the **Select All** checkbox.
2. Click **Delete** on the ribbon or the delete (

) button on the pane. A pop-up window appears and asks you to confirm your operation.
3. Click **OK** to delete the selected groups.

Managing OneDrive for Business

Use the **OneDrive for Business** tab to register SharePoint Online OneDrive for Business to DocAve Online in order for those OneDrive for Business to be managed by DocAve Online Granular Backup & Restore, Administrator, Content Manager, Replicator, and Report Center. You can also manage OneDrive for Business groups. An OneDrive for Business group is a collection of registered SharePoint Online OneDrive for Business that allows you to centrally manage and allocate your SharePoint Online OneDrive for Business.

To access the **OneDrive for Business** tab for DocAve Online, complete the following steps:

1. In Control Panel, click **OneDrive for Business** under the Office 365 Settings heading.
2. Click **Cancel** on the ribbon to close the **OneDrive for Business** page.

Working with the OneDrive for Business Tab

With **OneDrive for Business** activated, perform the actions on the ribbon according to your requirements. The buttons in the **OneDrive for Business Registration Mode** group are mainly used to choose the method of adding OneDrive for Business to the OneDrive for Business group.

- **Scan Mode** – Scan OneDrive for Business to add to OneDrive for Business groups.
- **Batch Import** – Import OneDrive for Business in batch to add to OneDrive for Business groups.
- **Single OneDrive for Business** – Add OneDrive for Business one by one to OneDrive for Business groups manually.

The buttons in the **Site Collection Management** group are mainly used to manage the OneDrive for Business and OneDrive for Business group.

- **Reconnect** – When the OneDrive for Business added in the OneDrive for Business group fail to connect, reconnect them by specifying your Office 365 credentials.
- **New Group** – Create a new OneDrive for Business group.
- **Delete** – Delete the selected OneDrive for Business groups.

The following buttons in the **Actions** group are used mainly to manage OneDrive for Business:

- **Add** – Add the selected OneDrive for Business on the left pane to the selected OneDrive for Business group on the right **OneDrive for Business** pane.
- **Remove** – Remove OneDrive for Business from the selected OneDrive for Business group.

Registering OneDrive for Business

Refer to the following sections to learn more about how to register OneDrive for Business.

Registering OneDrive for Business by Scan

Registering OneDrive for Business to OneDrive for Business groups allows you to centrally manage and allocate your SharePoint Online OneDrive for Business after scanning OneDrive for Business. To register OneDrive for Business you need to:

1. Scan OneDrive for Business in your SharePoint Online.
2. Add OneDrive for Business to the selected OneDrive for Business groups.

To start registering OneDrive for Business to OneDrive for Business groups, complete the following steps:

1. With **OneDrive for Business** activated, click **Scan Mode** in the **OneDrive for Business Registration Mode** group on the ribbon and then click **scan** in the **Actions** group, or you can click the **Scan** link on the left **OneDrive for Business** pane. A pop-up window appears.
2. On the pop-up window, specify your Office 365 credentials by selecting an authentication profile or enter the corresponding information. To scan all OneDrive for Business in your Office 365 tenant, make sure the Office 365 user ID you specified has the **global administrator** role.
    - **Select an authentication profile** – Select an authentication profile from the drop-down list. For more information of authentication profile, refer to Managing Office 365 Account.
    - **Provide the credentials** – Enter your Office 365 credentials and the SharePoint admin center URL. You can select **Save as an authentication profile** to save the entered information as an authentication profile.
3. Click **Connect** to connect to your SharePoint Online.
4. After connecting successfully, DocAve Online automatically starts to scan the OneDrive for Business in SharePoint Online. All available OneDrive for Business are displayed on the **OneDrive for Business** pane after scanning. The OneDrive for Business that have been registered to your OneDrive for Business groups will not display.
5. In **OneDrive for Business**, find your desired OneDrive for Business, and then select the checkboxes next to the Office 365 account. You can also perform the following actions:
    - To select all OneDrive for Business, select the **Select All** checkbox.
    - To search OneDrive for Business, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the OneDrive for Business whose Office 365 account contains the entered keyword.

      Note**: The search box supports wildcards (**?** and ***). **?** represents a character and * represents multiple characters. For example, enter **?abc to search OneDrive for

Business that starts with an unknown character and has multiple unknown characters after **abc**.

6. In the **OneDrive for Business Group** pane, select an OneDrive for Business group. You can also perform the following actions:

   - To create a new OneDrive for Business group, click the plus sign (

) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark ( ) button to save this new group.
   - To search OneDrive for Business groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.

     Note**: The search box supports wildcard (**?** and ***) to search for the OneDrive for Business under the OneDrive for Business groups. **?** represents a character and * represents multiple characters. For example, enter **?abc to search the OneDrive for Business whose Office 365 accounts start with an unknown character and have multiple unknown characters after **abc**.

   - To delete OneDrive for Business groups, select the groups and then click **Delete** on the ribbon or the delete (

) button to delete the selected groups.

7. Click **Add** on the ribbon or **Add>>** between the two panes to add the selected OneDrive for Business to the selected OneDrive for Business group. The added OneDrive for Business will not display in the left pane.

   To remove an OneDrive for Business from the group, select the group to include all OneDrive for Business or expand the group to select the specified OneDrive for Business and then click **Remove** on the ribbon or **<<Remove** to move the OneDrive for Business from the group to the **OneDrive for Business** pane.

8. Click **Save** to save changes and complete the process of registering OneDrive for Business. To cancel your changes, click **Cancel**.

Registering in Batch by Configuration File

To register OneDrive for Business to a specified OneDrive for Business group in batch by using a configuration file, download a configuration file template first. Then provide the OneDrive for Business information in the file, import the file, and register OneDrive for Business to the specified OneDrive for Business group.

1. With **OneDrive for Business** activated, click **Batch Import** on the ribbon.
2. Click **Download Template** on the ribbon.
3. In the pop-up window, select a location to save the **Import_OneDrive_for_Business_Template** file. You can modify the file name according to your requirements.

4. Open the configuration file and enter the Office 365 user IDs of the users whose OneDrive for Business will be registered.
5. Save changes to the file and close it.
6. Click **Browse** to upload the template.
7. **Username and Password** – Specify your Office 365 credentials that have access to all OneDrive for Business.

   ***Note:** The user specified here must be the administrator for the OneDrive for Business that you want to register to the specified OneDrive for Business group, or own the **global administrator** role.

8. Select an OneDrive for Business group on the OneDrive for Business Group pane. You can also perform the following actions:

   - To create a new OneDrive for Business group, click the plus sign (

) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark ( ) button to save this new group.
   - To search for the OneDrive for Business groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.
   - To delete the OneDrive for Business groups, select the groups and then click **Delete** on the ribbon or the delete (

) button to delete the selected groups. The OneDrive for Business added to the group will be moved to the **OneDrive for Business** pane.

9. Click **Add** on the ribbon or **Add>>** between the two panes to add the OneDrive for Business in the file to the selected OneDrive for Business group.

   To remove the OneDrive for Business from the group to the **OneDrive for Business** pane, select the group to include all the OneDrive for Business or expand the group to select the specified OneDrive for Business and then click **Remove** on the ribbon or **<<Remove** between the two panes.

10. Click **Save** to complete the process of registering OneDrive for Business. To cancel your changes, click **Cancel**.

Registering a Single OneDrive for Business

Registering a single OneDrive for Business allows you to add your desired OneDrive for Business to OneDrive for Business group fast and conveniently. To add a single OneDrive for Business to your desired OneDrive for Business group manually, complete the following steps:

1. With OneDrive for Business activated, click **Single OneDrive for Business** in the OneDrive for Business Registration Mode group on the ribbon.
2. Enter the **Username** and **Password** in the left pane. Make sure the user you specified has access to the specified OneDrive for Business.

3. On the **OneDrive for Business Group** pane, select an OneDrive for Business group. You can perform the following actions:

    - To create a new OneDrive for Business group, click the plus sign (

) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark ( ) button to save this new group.
    - To search for OneDrive for Business groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the groups whose group name contains the entered keyword.
    - To delete OneDrive for Business groups, select the groups and then click **Delete** on the ribbon or the delete (

) button to delete the selected groups. The OneDrive for Business added to the group will be moved to the **OneDrive for Business** pane.

4. Click **Add** on the ribbon or **Add>>** between the two panes to add the OneDrive for Business in the file to the selected OneDrive for Business group.

    To remove the OneDrive for Business from the group to the **OneDrive for Business** pane, select the group to include all the OneDrive for Business or expand the group to select the specified OneDrive for Business and then click **Remove** on the ribbon or **<<Remove**.

5. Click **Save** to complete the process of registering the OneDrive for Business. To cancel your changes, click **Cancel**.

Reconnecting OneDrive for Business

If DocAve Online cannot connect to the OneDrive for Business that have been registered to the OneDrive for Business group, then they will not be managed via DocAve Online. When this happens, you can reconnect the OneDrive for Business. Each time when loading the **OneDrive for Business** page, DocAve Online will automatically check whether all registered OneDrive for Business can be connected. If it fails to connect, a message will appear under the ribbon. To reconnect the OneDrive for Business, complete the following:

- Click **Clear All** to remove the unconnected OneDrive for Business from the OneDrive for Business groups.
- Reconnect the OneDrive for Business.
    i. With **OneDrive for Business** activated, expand the OneDrive for Business group to find the OneDrive for Business whose Office 365 account is greyed out.
    ii. Click the reconnect ( ) button next to the Office 365 user ID.
    iii. In the **OneDrive for Business Connection** pop-up window, specify your Office 365 user ID and password.
    iv. Click **Connect** to reconnect the OneDrive for Business.

If the password of your Office 365 account has been changed, select the OneDrive for Business registered by this Office 365 account and click **Reconnect** on the ribbon. On the **OneDrive for Business Connection** pop-up window, enter your Office 365 user ID and the latest password, and then click **Connect**.

Managing OneDrive for Business Groups

An OneDrive for Business group is a collection of registered SharePoint Online OneDrive for Business that allows you to centrally manage and allocate your SharePoint Online OneDrive for Business. You can perform the following actions in the **OneDrive for Business** page to manage your groups:

- **New Group**– Create a new OneDrive for Business group.
- **Delete** – Delete the selected OneDrive for Business groups.

Creating a OneDrive for Business Group

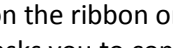
To create a new OneDrive for Business group, complete the following steps:

1. In the **OneDrive for Business** page, click **New Group** on the ribbon or the plus sign (

) button on the **OneDrive for Business Group** pane.
2. Enter a group name in the text box.
3. Click the checkmark ( ) button to save this new group.
4. Repeat steps from 1 to 3 to create new groups.

Deleting OneDrive for Business Groups

To delete an OneDrive for Business group, complete the following steps:

1. In the **OneDrive for Business** page, select the groups you want to delete on the **OneDrive for Business Group** pane. To delete all groups, select the **Select All** checkbox.
2. Click **Delete** on the ribbon or the delete (

) button on the pane. A pop-up window appears and asks you to confirm your operation.
3. Click **OK** to delete the selected groups.

Managing Exchange Mailboxes

Use **Exchange Mailboxes** (located in DocAve Online Control Panel) to register Exchange Online mailboxes to DocAve Online in order for those mailboxes to be managed via DocAve Online.

You can also manage Exchange Mailboxes groups. An Exchange Mailboxes group is a collection of registered Exchange Online mailboxes, which allows you to centrally manage and allocate your Exchange Online mailboxes.

To access the **Exchange Mailboxes** tab for DocAve Online, complete the following steps:

1. In Control Panel click **Exchange Mailboxes** under the Office 365 Settings heading.
2. When finished with the Exchange mailboxes management, click **Cancel** on the ribbon to close the **Exchange Mailboxes** page.

Working with the Exchange Mailboxes Tab

With **Exchange Mailboxes** activated, perform the actions on the ribbon according to your requirements. The buttons in the **Mailbox Registration** group are mainly used to choose the method of adding mailboxes to Exchange Mailboxes group.

- **Scan Mailboxes** – Scan mailboxes (including the shared mailboxes) to add to Exchange Mailboxes group.
- **Add Single Mailbox** – Add mailboxes one by one to Exchange Mailboxes groups manually.

The buttons in the **Actions** group are mainly used to manage the Exchange Online mailboxes and Exchange Mailboxes group.

- **Reconnect** – When the mailboxes added in Exchange Mailboxes group fail to connect, reconnect them by specifying your Office 365 credentials.
- **New Group** – Create a new Exchange Mailboxes group.
- **Delete** – Delete the selected Exchange Mailboxes groups.
- **Add** – Add the selected mailboxes on the left pane to the selected Exchange Mailboxes group on the right **Exchange Mailboxes Group** pane.
- **Remove** – Remove the mailboxes from the selected Exchange Mailboxes group.
- **Scan**– Scan the mailboxes in your Exchange Online. The available mailboxes will be displayed on the left **Mailbox** pane.

Registering Mailboxes by Scan

Registering mailboxes to Exchange Mailboxes groups allows you to centrally manage and allocate your Exchange Online mailboxes after scanning mailboxes. For best results, it is recommended that you select a separate admin account for registering mailboxes. This will help alleviate any potential performance issues when registering. To register mailboxes, you need to:

1. Scan the mailboxes in your Exchange Online.
2. Add the desired mailboxes to the selected Exchange Mailboxes groups.

To start registering mailboxes to Exchange Mailboxes groups, complete the following steps:

1. With the **Exchange Mailboxes** tab activated, click **Scan Mailbox** in the **Mailbox Registration** group on the ribbon and then click **Scan** in the **Actions** group, or you can click the **Scan** link on the left **Mailbox** pane. A pop-up window appears.
2. On the pop-up window, specify your Office 365 credentials. To scan all mailboxes in your Exchange Online, make sure the Office 365 user ID you specified has the **global administrator** role.
    - **Select an authentication profile** – Select an authentication profile from the drop-down list. For more information of authentication profile, refer to Managing Office 365 Account.
    - **Provide the credentials** – Enter your Office 365 user ID and password in the corresponding text boxes.
3. Click **Connect** to connect to Exchange Online.
4. After connecting successfully, DocAve Online automatically starts to scan the mailboxes in Exchange Online. All available mailboxes are displayed on the **Mailbox** pane after scanning. The mailboxes that have been registered to your Exchange Mailboxes groups will not be displayed.
5. On the **Mailbox** pane, find your desired mailboxes, and then select the checkboxes next to the mailboxes. You can also perform the following actions:
    - To select all mailboxes, select the **Select All** checkbox.
    - To search for the mailboxes, enter the keyword in the **Input Keyword** text box, then click the magnifying glass ( ) button to search and locate the mailboxes whose address contains the entered keyword.

      Note**: The search box supports wildcards (**?** and ***). **?** represents a character and * represents multiple characters. For example, enter **?abc to search the mailboxes whose names start with an unknown character and have multiple unknown characters after **abc**.
6. On the **Exchange Mailboxes Group** pane, select an Exchange Mailboxes group. You can also perform the following actions:

- To create a new Exchange Mailboxes group, click the plus sign ( ) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark () button to save this new group.
- To search Exchange Mailboxes groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass () button to search and locate the groups whose group name contains the entered keyword.

  Note**: The search box supports wildcard (**?** and ***) to search for the mailboxes under the Exchange Mailboxes groups. **?** represents a character and * represents multiple characters. For example, enter **?abc to search the mailboxes whose names start with an unknown character and have multiple unknown characters after **abc**.
- To delete the Exchange Mailboxes groups, select the groups and then click **Delete** on the ribbon or the delete ( ) button to delete the selected groups. The mailboxes added to the group will be moved to the **Mailbox** pane.

7. Click **Add** on the ribbon or **Add>>** between the two panes to add the selected mailboxes to the selected Exchange Mailboxes group. The added mailboxes will not display in the left pane.

   To remove the mailboxes from the group, select the group to include all mailboxes or expand the group to select the specified mailboxes and then click **Remove** on the ribbon or **<<Remove** to move the mailboxes from the group to the **Mailbox** pane.
8. Click **Save** to save changes and complete the process of registering mailboxes. To cancel your changes, click **Cancel**.

Registering a Single Mailbox

Registering a single mailbox to Exchange Mailboxes groups allows you to add your desired mailbox to Exchange Mailboxes groups one by one fast and conveniently. To register a single mailbox to your desired Exchange Mailboxes groups manually, complete the following steps:

1. With Exchange Mailboxes activated, click **Add Single Mailbox** in the Mailbox Registration group on the ribbon.
2. Enter the **Mailbox address** and **Password** in the left pane. Make sure the user you specified has access to the specified mailbox.
3. In the **Exchange Mailboxes Group** pane, select an Exchange Mailboxes group. You can also perform the following actions:
   - To create a new Exchange Mailboxes group, click the plus sign ( ) button on the pane or **New Group** on the ribbon. Enter a group name in the text box and click the checkmark () button to save this new group.
   - To search Exchange Mailboxes groups, enter the keyword in the **Input Keyword** text box, then click the magnifying glass () button to search and locate the groups whose group name contains the entered keyword.

- To delete Exchange Mailboxes groups, select the groups and then click **Delete** on the ribbon or the delete ( ) button to delete the selected groups. The mailboxes added to the group will be moved to the **Mailbox** pane.

4. Click **Add** on the ribbon or **Add>>** between the two panes to add the specified mailbox to the selected Exchange Mailboxes group. The added mailbox will not display in the left pane.

   To remove the mailbox from the group, select the group to include all mailboxes or expand the group to select the specified mailboxes and then click **Remove** on the ribbon or **<<Remove** to move the mailboxes from the group to the **Mailbox** pane.

5. Click **Save** to save changes and complete the process of registering mailboxes. To cancel your changes, click **Cancel**.

Reconnecting Mailboxes

If DocAve Online cannot connect to the mailboxes that have been registered to Exchange Mailboxes group, then they will not be managed via DocAve Online. When this happens, you can reconnect the mailboxes. Each time when loading the **Exchange Mailboxes** page, DocAve Online will automatically check whether all registered mailboxes can be connected to. If it fails to connect to mailboxes, a message will appear under the ribbon. You can choose to perform:

- Click **Clear All** to remove the unconnected mailboxes from the Exchange Mailboxes groups.
- Reconnect the mailboxes.
  i. With the **Exchange Sites** tab activated, expand the Exchange Mailboxes group to find the mailboxes whose address is greyed out.
  ii. Click the reconnect ( ) button next to the mailbox URL.
  iii. On the **Mailbox Connection** pop-up window, specify your Office 365 user ID and password.
  iv. Click **Connect** to reconnect the mailbox.

If the password of your Office 365 account has been changed, select the mailboxes registered by this Office 365 account and click **Reconnect** on the ribbon. On the **Mailbox Connection** pop-up window, enter your Office 365 user ID and the latest password, and then click **Connect**.

Managing Exchange Mailboxes Groups

An Exchange Mailboxes group is a collection of registered Exchange Online mailboxes that allows you to centrally manage and allocate your Exchange Online mailboxes. You can perform the following actions in the **Exchange Mailboxes** page to manage your groups:

- **New Group**– Create a new Exchange Mailboxes group.

- **Delete** – Delete the selected Exchange Mailboxes groups.

Creating an Exchange Mailboxes Group

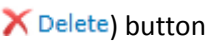
To create a new Exchange Mailboxes group, complete the following steps:

1. In the **Exchange Mailboxes** page, click **New Group** on the ribbon or the plus sign (

) button on the **Exchange Mailboxes Group** pane.
2. Enter a group name in the text box.
3. Click the checkmark ( ) button to save this new group.
4. Repeat steps 1 to 3 to create new groups.

Deleting Exchange Mailboxes Groups

To delete a new Exchange Mailboxes group, complete the following steps:

1. In the **Exchange Mailboxes** page, select the groups you want to delete on the **Exchange Mailboxes Group** pane. To delete all groups, select the **Select All** checkbox.
2. Click **Delete** on the ribbon or the delete (

) button on the pane. A pop-up window appears and asks you to confirm your operation.
3. Click **OK** to delete the selected groups.

Exchange Online Backup and Restore

Exchange Online Backup and Restore ensures resiliency of service in the event of a disaster and quickly recovers lost or corrupted content from the backup. It offers full and incremental backup capabilities for Exchange Online content, enabling the user to build backup plans and schedules that focus on frequent backup of high priority data, thereby improving backup operations and storage efficiency.

Launching Exchange Online Backup and Restore

To launch Exchange Online Backup and Restore and access its functionality, complete the following steps:

1. Log into AvePoint Online Services and navigate to DocAve Online. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all modules on the left side of the window.
2. From the **DocAve** tab, click **Data Protection** to view the backup modules**.**
3. Click **Exchange Online Backup & Restore** to launch this module.

User Interface Overview

The Exchange Online Backup and Restore user interface launches with the **Backup** tab active. This tab displays your registered mailboxes and allows for quick access to a list of Exchange Online Backup and Restore features.

- The **My Registered Mailboxes** node in the left panel contains all registered mailboxes. Use this panel to select the content that you want to perform actions on. Selecting content often reveals new tabs and functionality on the ribbon.
- The **ribbon** shows the available actions and wizards for the selected nodes. This content is dynamic; it will often change depending on what is selected in the **My Registered Mailboxes** node.
- The right **workspace** shows all form-based content that is used during the configuration of actions performed in DocAve products.

Configuring Devices and Setting up Storage Policies

In order to perform a backup job using Exchange Online Backup and Restore, it is necessary to first configure one or more physical devices and then set up a storage policy.

When performing a backup job, Exchange Online Backup and Restore can write to FTP, SFTP, TSM, Microsoft Azure Storage, Amazon S3, Rackspace Cloud File, Dropbox, Box, and OneDrive devices.

***Note**: DocAve Online supports specifying a folder in FTP/SFTP to store the data through configuring the **Folder Structure** field. This field is optional. In the **Root Folder** text box, enter the desired folder structure in FTP/SFTP where you would like to store the data (if the specified folder structure does not exist in FTP/SFTP, the folder structure will be created automatically). The data will be stored according to the specified folder structure. If you do not configure this field, the data will be stored in the FTP/SFTP root folder.

In addition, DocAve Online has the ability to treat multiple storage devices as a single logical unit when saving backup data. This feature is especially useful for very large backup plans, as many small drives can be combined. A logical drive must be defined before creating a backup plan.

For instructions on defining devices and setting up storage policies, refer to the Control Panel Reference Guide.

Performing an Exchange Online Backup

There are several ways to configure and perform an Exchange Online backup. Once you select the content you want, you can run backups using the following methods:

- Using Ad Hoc Backup
- Using the Plan Builder (Using Wizard Mode or Using Form Mode)

Overview of Backup Types

When configuring a backup plan using the Using the Plan Builder or Predefined Schemes, there are two backup types you can specify to perform a backup job: **Full** or **Incremental**.

The **Full** option backs up all of the selected data each time a backup is performed. This option requires the most storage space because, depending upon the size of your Exchange mailboxes, each backup file can be substantial in size. Unlike incremental backups, all full backup files are independent of one another and do not have any dependencies on other back up data files. However, because each of the backups is comprehensive, full backup jobs take the longest to complete of the two available options.

The **Incremental** option backs up only the content that has been updated since the last backup, drastically reducing the size of the backup file created. The most common option, this backup requires less storage than a full backup. Incremental backups reduce execution time, thereby allowing for shorter backup windows. It is important to note, however, that in order to recover all of the most recent Exchange data from an incremental backup, all of the backup files must be available. Consider each incremental backup file as a piece of all backed-up mailboxes. If one of these files is not available, the full mailbox data cannot be restored.

For example, the following four cylinders represent four backups and they are performed in this order– Full Backup, Incremental Backup, Incremental Backup, Incremental Backup:

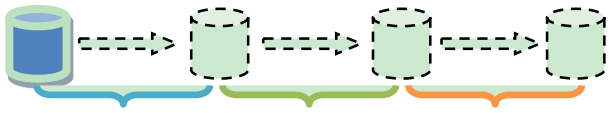


Figure 1: One Full backup followed by three Incremental backups.

1. The first Incremental Backup backs up the newly added data in the blue period.
2. The second Incremental Backup backs up the newly added data in the green period.
3. The third Incremental Backup backs up the newly added data in the orange period.

Selecting Content to Back Up

There are two options you can use when selecting content to back up: Search and Browse.

Refer to the sections below for instructions on selecting content by search or by browse.

Selecting Content by Search

For a large environment, use the search function to quickly locate the target content. To use the search function, complete the following steps:

1. With the **Backup** tab activated, locate the **Source** panel on the left.
2. In the search field at the top of the **Source** panel, enter the keywords of your Exchange mailbox address, folder name, or item name.
3. Click the magnifying glass ( ) button to start the search or wait a moment for it to start automatically. When the search is running, you can click the stop ( ) button to stop the search, if needed.
4. Select the relevant objects that you want to back up by clicking the checkboxes to the left of the objects.
5. After selecting content, choose to perform either a backup using the Using Ad Hoc Backup or a backup using the Using the Plan Builder.

Selecting Content by Browse

To browse through the SharePoint farm objects, complete the following steps:

1. With **Backup** activated, click the **My Registered Mailboxes** node which contains the relevant registered mailboxes.
2. Expand the desired Exchange Mailboxes groups.
3. Select the checkboxes next to the relevant objects you want to back up. You can select objects throughout the mailboxes.
4. After selecting content, choose to perform either a backup using the Using Ad Hoc Backup or a backup using the Using the Plan Builder. See the appropriate section below.

Understanding Ad Hoc Backup

An Ad Hoc Backup job backs up the selected content immediately (without setting up a schedule) using the default settings, which needs to be configured prior to running the backup.

***Note**: An Ad Hoc Backup job is a back-end process, meaning that the job runs in the background. The user can continue to navigate through the user interface without having to first terminate the running job.

To use Ad Hoc Backup, you must first define the default settings, as described below.

Configuring Default Settings

To use Ad Hoc Backup, it is necessary to first configure the default settings. To configure default backup settings, complete the following steps:

1. After Selecting Content to Back Up, click **Ad Hoc Backup** on the ribbon.
2. Select **Default Settings** from the drop-down list. The **Default Settings** page appears.
3. **Storage Policy** – Select a storage policy for the backup data, or create a new storage policy. A storage policy is used to configure a set of rules for storing backed up data. It also supports the function of pruning the backup data, and deleting or moving the pruned backup data.

   For more information on working with storage policies, refer to the Control Panel Reference Guide.

4. **Filter Policy** – Select a filter policy or create a new one to limit the scope of the backup job. A filter policy sets up filter rules to control what objects will be backed up. For more information on working with filter policies, refer to the Control Panel Reference Guide.
5. **Data Compression** – Select an optional data compression setting. Select the **Compression** checkbox to enable data compression, and then choose a compression level using the slider. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set. Compressing data causes slower backup and additional recovery time.
6. **Data Encryption** – Select the **Encryption** checkbox (optional) to enable data encryption. Select a security profile or create a new one to specify the encryption method for the encryption. For more information on working with security profiles, refer to the Control Panel Reference Guide. Encrypting data causes slower backup and additional recovery time.
7. **Notification** – Select an e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the Control Panel Reference Guide.

Using Ad Hoc Backup

In order to perform an Ad Hoc Backup job, you must first configure the Configuring Default Settings.

To initiate an Ad Hoc Backup job, complete the following steps:

1. After Selecting Content to Back Up and Configuring Default Settings, click **Ad Hoc Backup** on the ribbon.
2. Select **Ad Hoc Backup** from the drop-down list. The **Ad Hoc Backup** tab appears.
3. DocAve automatically loads your Configuring Default Settings into the **Ad Hoc Backup** page. Edit these settings as needed.
4. Click **Run Now** at the bottom of the window to start the backup job. View the job details in Job Monitor.

Using the Plan Builder

Configuring Plan Builder settings is very similar to configuring the default settings for an Ad Hoc Backup. Use Plan Builder when you want to schedule a backup and define the type of backup (Full or Incremental) or when you want to use the Predefined Schemes feature.

***Note**: A backup run with Plan Builder is a back-end process, meaning that the job runs in the background. The user can continue to navigate through the user interface without having to first cancel the running job.

To use the Plan Builder, complete the following steps:

1. After Selecting Content to Back Up, click **Plan Builder** from the **Backup** tab.
2. From the drop-down menu, select Using Wizard Mode for step-by-step guidance during configuration, or select User Form Mode (recommended for advanced users only).

See the section below applicable to your choice.

Using Wizard Mode

To configure a plan using Wizard Mode, complete the following steps:

***Note:** A red asterisk (*) marked next to a field in the DocAve GUI indicates a mandatory field.

1. **Plan Name** – Enter a plan name and an optional description, if desired.

   Click **Next**. The **Storage Policy** page appears.

2. **Storage Policy** – Configure the following settings:

   - **Storage Policy** – Select a storage policy for the backup data, or create a new storage policy. A storage policy is used to configure a set of rules for storing backed up data. It also supports the function of pruning the backup data, and deleting or moving the pruned backup data.

For more information on working with storage policies, refer to the Control Panel Reference Guide.

- **Data Compression** – Select an optional data compression setting. Select the **Compression** checkbox to enable data compression, and then choose a compression level using the slider. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set. Compressing data causes slower backup and additional recovery time.
- **Data Encryption** – Select the **Encryption** checkbox (optional) to enable data encryption. Select a security profile or create a new one to specify the encryption method for the encryption. For more information on working with security profiles, refer to the Control Panel Reference Guide. Encrypting data causes slower backup and additional recovery time.

Click **Next** when you are finished configuring the storage policy. The **Schedule** page appears.

3. **Schedule** – Select a scheduling option. This field determines the type of backup (Full or Incremental) that will be run.
    - **No Schedule** – Select this option to configure the job to not run on a schedule (the job must be manually initiated).
    - **Select a predefined scheme** – Select this option to run the backup on a Predefined Schemes.
    - **Configure the schedule myself** – Select this option to configure a customized schedule, and run the backup job by schedule. Click **Add Schedule** to set up a schedule. The **Add Schedule** window appears. In the **Options** section, select a backup type from the drop-down list. For more information, see Overview of Backup Types
        - **Full Backup** – A full backup of the selected source.
        - **Incremental Backup** – A partial backup; backs up only the content that has been updated since the last backup, whether it's a Full backup or an Incremental backup.

    After configuring the schedule, click **OK** to save and return to the previous page. Click **Calendar View** to view the scheduled plans by day, week, or month.

    ***Note**: Frequent consecutive full backups have a tendency to repeatedly back up the same data, which fills disk space quickly. For best results when conducting high frequency backups, it is recommended to use incremental backups. Incremental backups save time and storage space by backing up only the differences between incremental backups or an incremental backup and a full backup, instead of backing up the entire source location.

    Click **Next** when you are finished. The **Advanced** page appears.

4. **Advanced** – Define the advanced settings:

- **Filter Policy** – Select a filter policy or create a new one to limit the scope of the backup job. A filter policy sets up filter rules to control what objects will be backed up. For more information on working with filter policies, refer to the Control Panel Reference Guide.
- **Notification** – Select an e-mail notification profile for sending e-mails. For more information on working with notification policies, refer to the Control Panel Reference Guide.

When you are finished setting up settings, click **Next** on the ribbon. The **Overview** screen appears.

5. **Overview** – Review and edit the plan selections. To make changes, click **Edit** to the right of the row. This links to the corresponding setting page, allowing you to edit the configuration.
6. Click the triangle next to **Finish** on the lower-right section of the screen, then select **Finish** or **Finish and Run Now**. The backup plan will now appear in Plan Manager.

   If you select **Finish and Run Now**, the **Run Now** pop-up window appears. Select a backup option from the **Option** drop-down list and then click **OK** to start the backup job.

Using Form Mode

Form Mode is intended for advanced users only. To configure a plan using Form Mode, complete the following steps:

***Note:** A red asterisk (*) marked next to a field in the DocAve GUI indicates a mandatory field.

1. **Plan Name** – Enter a plan name and optional description, if desired.
2. **Storage Policy** – Select a storage policy for the backup data, or create a new storage policy. A storage policy is used to configure a set of rules for storing backed up data. It also supports the function of pruning the backup data, and deleting or moving the pruned backup data.

   For more information on working with storage policies, refer to the Control Panel Reference Guide.

3. **Schedule Selection** – Select a scheduling option.

   ***Note:** This field determines the type of backup (Full or Incremental) that will be run.

   - **No Schedule** – Select this option to configure the job to not run on a schedule (the job must be manually initiated).
   - **Select a predefined scheme** – Select this option to run the backup on a Predefined Schemes.
   - **Configure the schedule myself** – Select this option to configure a customized schedule, and run the backup job by schedule. Click **Add Schedule** to set up a schedule. The **Add Schedule** window appears. In the **Options** section, select a backup type from the drop-down list. For more information, see Overview of Backup Types.
     - **Full Backup** – A full backup of the selected source.

- **Incremental Backup** – A partial backup; backs up only the content that has been updated since the last backup, whether it's Full or Incremental.

After configuring the schedule, click **OK** to save and return to the previous page. Click the **Calendar View** to view the scheduled plans by day, week, or month.

***Note**: Frequent consecutive full backups have a tendency to repeatedly back up the same data, which fills disk space quickly. For best results when conducting high frequency backups, it is recommended to use incremental backups. Incremental backups save time and storage space by backing up only the differences between incremental backups or an incremental backup and a full backup, instead of backing up the entire source location.

4. **Filter Policy** – Select a filter policy or create a new one to limit the scope of the backup job. A filter policy sets up filter rules to control what objects will be backed up. For more information on working with filter policies, refer to the Control Panel Reference Guide.
5. **Advanced** – Configure the following additional options:
   - **Data Compression** – Select an optional data compression setting. Select the **Compression** checkbox to enable data compression, and then choose a compression level using the slider. A low compression level results in a faster compression rate but a larger data set, while a high compression level results in a slower compression rate but a smaller, better quality data set. Compressing data causes slower backup and additional recovery time.
   - **Data Encryption** – Select the **Encryption** checkbox (optional) to enable data encryption. Select a security profile or create a new one to specify the encryption method for the encryption. For more information on working with security profiles, refer to the Control Panel Reference Guide. Encrypting data causes slower backup and additional recovery time.
   - **Notification** – Select an e-mail notification profile for sending e-mails. For more information on working with notification policies, refer to the Control Panel Reference Guide.
6. Click **OK** or **OK and Run Now** on the lower-right section of the screen. The backup plan is now listed in Plan Manager.

   If you select **OK and Run Now**, the **Run Now** pop-up window appears. Select a backup option from the **Option** drop-down list and then click **OK** to start the backup job.

Performing an Exchange Online Restore

An Exchange Online restore can be performed only on data backed up using DocAve Online's Exchange Backup and Restore. The selected backed-up data can be restored to its original location in Exchange Online. To configure and run a restore, complete the following sections:

1. Select backed-up data.

2. Configure restore settings.
3. Run a restore job.

Follow the steps below for detailed information:

1. With **Restore** activated, click **Restore** on the ribbon or **Start with Time-based Restore** in the workspace. The **Job Selection** page appears in the **Restore Wizard** tab.
2. **Job Selection** – The backup jobs that have been completed within the last 7 days are available in the calendar. Click **Day**, **Week**, or **Month** in the top-right corner of the calendar to change the view to see all available jobs. Click the left and right arrows beside the date on the top-left of the calendar to move forward or backward. Select a backup job which contains the content that you want to restore.

   You can also configure settings in the **Filter By** field to limit the scope of the displayed backup job. The logical relationship between the following filter rules is **AND**.

   - **Plan Filter** – Filter backup jobs by plan name. By default, all plans are selected.
   - **Job Filter** – Filter backup job by job type. Select the backup type in the **Job Filter** drop-down list. If you check the **Include jobs with only partial backup data** checkbox, any backup jobs that are stopped prior to completion are included in the backup. By default, **Full** is selected**.**
   - **Time Range** – Filter backup data by job completed time range. The **All jobs** selection lists all backup jobs whenever the job completed, while **Job completed within** filters the backup jobs which are completed in the specified time range. By default, **Jobs completed within Last 7 Days** is selected.

   After you finish configuring the **Filter By** drop-down lists, click the newly appeared **Filter** button. All the backup jobs that meet the filter rules are listed in the calendar. Click **Reset** to cancel the filter settings.

   When you are finished, click **Next**. The **Data Selection** page appears.

3. **Data Selection** – Select backed-up data to restore. You can browse through the backed-up data by clicking on objects to expand the data tree. There is a checkbox corresponding to each level on the data tree, which is deselected by default.

   - Click the **Items** node and the **Item Browser for Items** window appears. The items are displayed with the related properties, including file name, sender, recipients, send time, with attachment, and category. Click the checkbox before each item to select the item, and then click **OK** to save your configurations.
   - You can use the Advanced Search function to filter out specific objects or data within each Exchange level. Click **Advanced Search** on the ribbon to use this function. For more information, refer to Appendix B: Advanced Search.

   When finished, click **Next**. The **Restore Type** page appears.

4. **Restore Type** – Specify where the content will be restored.

- **Restore Type** – Choose the location where you want to restore your data.
    - **In place restore** – Restores the content to its original location.
    - **Restore to storage policy** – Restores the content to a specific storage policy.
- **File Type** (This section appears when you select **Restore to storage policy** as the restore type) – Select **PST File** as the file type from the drop-down list.
- **Destination** (This section appears when you select **Restore to storage policy** as the restore type) – Enter your desired prefix for the PST files in the **Prefix** text box, and then select a previously configured storage policy from the **Storage policy** drop-down list or click **New Storage Policy** to create a new one. For details, refer to the Control Panel Reference Guide.
- **PST File Setting** – Click **Advanced**. The **PST File Setting** appears. If the mailboxes in the selected data contain large numbers of e-mails, you can choose to generate multiple PST files for one mailbox. Select the **Generate multiple PST files for one mailbox** checkbox, and then define how many folders each PST file will contain by entering a positive integer in the text box.

Click **Next.** The **Restore Settings** page appears.

5. **Restore Settings** – Configure the following settings for the restore:
    - **Conflict Resolution** (Only for in place restore) – Define a conflict resolution behavior. If the Exchange object name in the source node is the same name as an existing object in the target node, a conflict happens.
        - **Container level conflict resolution** – Set a conflict resolution on the folder level. **Skip** ignores the source container that has the same name as the target one.
        - **Content level conflict resolution** – Set a conflict resolution on the item level.
            - **Skip** ignores the source item that has the same item name as the destination item.
            - **Overwrite** copies the source item to the target by overwriting the target item with same item name.
    - **Notification** – Select an e-mail notification profile for sending e-mails. For more information on working with notification policies, refer to the Control Panel Reference Guide.

    Click **Next** when you are finished. The **Schedule** page appears.

6. **Schedule** – Configure the schedule to set the time to restore the content:
    - **Schedule Selection** – Choose Restore immediately after the wizard finishes to run the restore job immediately, or choose Configure the schedule myself to configure a customized schedule.
    - **Description** – Optionally enter a description of the restore job in the text box.

    Click **Next** to advance to the **Overview** page.

7. **Overview** – Review and edit the plan selections. To make changes, click **Edit** to the right of a heading row to go to the corresponding setting page, allowing you to edit the configuration.

   Click **Finish** when you are done. The restore job will start according to your schedule settings.

Checking a Job Status

Exchange Online Backup and Restore contains a **Job Monitor** button that allows users to view the status of plans within the module. This feature is useful for monitoring jobs or troubleshooting for errors. Refer to the Job Monitor Reference Guide for more information.

Additional Optional Configurations

Refer to the sections below regarding additional optional configurations in Exchange Online Backup and Restore.

Predefined Schemes

In order to run the backup job on a schedule, you must first configure a predefined scheme. In the **Predefined Scheme** page you can view the default **Weekly Scheme** and the **Monthly Scheme**. Use these two default schemes or create a new scheme as required. To set up a new predefined scheme, complete the following steps:

1. With **Backup** activated, click **Predefined Scheme** on the ribbon. The **Predefined Scheme** page appears.
2. Click **Create** in the **Manage** group on the ribbon.
3. **Name** – Enter a name into the **Predefined Scheme** text box, and add an optional description.
4. **Schedule Settings** – Click **Add Schedule** to set up a schedule. The **Add Schedule** tab appears.
5. **Options** – Select a backup type from the drop-down list. For more information, refer to the Overview of Backup Types section.
   - **Full Backup** – A full backup of the selected source.
   - **Incremental Backup** – A partial backup; backs up only the data that has been added since the last backup (whether it's Full or Incremental).

   *__Note__: Frequent consecutive full backups have a tendency to repeatedly back up the same data, which fills disk space quickly. For best results when conducting high frequency backups, it is recommended that you use incremental backups. Incremental backups save time and storage space by backing up only the differences between incremental backups or an incremental backup and a full backup, instead of backing up the entire source location.
6. **Type** – Select the interval at which the backup occurs: **By day**, **By week**, or **By month**.

7. **Schedule Settings** – Set up the frequency for the scheduled backup job. If you select the type as **By week**, or **By month**, you will have the option to check the **Advanced** checkbox to configure more settings for the frequency. For more information, see the Advanced Predefined Scheme Settings section below.
8. **Range of Recurrence** – Choose one of the following options to specify when to start and stop running the recurring schedule.
    - **No end date** – The job is run on schedule all the time.
    - **End after … occurrences** – The job stops running after running the specified times.
    - **End On** – The job ends by the date you specify.

Advanced Predefined Scheme Settings

The following advanced settings are available for configuring a predefined scheme:

By Week

Run every … week(s); On … – Specify the days of the week to run the plan on, and after how many weeks to recur.

By Month

- **On day … of …** – Select the day and the month to run the backup job. For example, specify this option as **On day 3 of January**, and the backup is run on 3rd January.
- **Day … of every …months** – Select the day and the month interval to run the backup job. For example, specify this option as **Day 3 of every 2 months**, and the backup is run on the 3rd day of every two months.
- **The … … of every … months** – Select the time and the interval for the backup job. For example, set this option as **The First Monday of every 3 months**, and the backup is run on the first Monday every 3 months.
- **The … … of …** – Select the day and the month for the backup job. For example, set this option as **The First Monday of January**, and the backup is run on the first Monday of January.

Managing DocAve Online Accounts

Use **Account Manager** to view DocAve Online users and view/manage DocAve Online user permissions. Different user types can perform different actions. Refer to the following sections for details.

To access the **Account Manager** tab for DocAve Online, complete the following steps:

1. In Control Panel, click **Account Manager** under the Account Manager heading.
2. When finished with user management, click **Close** on the ribbon to close the **Account Manager** page.

User Type

In DocAve Online, there are three types of users:

- **Power User** – Power user has the role of Service Administrator or Tenant User (Application Administrator) in AvePoint Online Services. In Account Manager, a power user can view DocAve Online users and view/manager DocAve Online user permissions using the user-based view or the object-based view.
- **Standard User** – Standard user has the role of Tenant User (Standard User) in AvePoint Online Services. In Account Manager, a standard user can view the managed site collections and plans shared to him or her.
- **Support** – A member of AvePoint's Support staff can be invited to your DocAve Online session to resolve customer issues. For more information on inviting AvePoint Support to help resolve issues, refer to Troubleshooting.

Power User

The user who registers in AvePoint Online Services (the Tenant Owner of AvePoint Online Services) is the first power user of DocAve Online. The register can invite new power users to collaborate. Power users can use the following two views to manage DocAve Online users and permissions:

- **User-based View** – This view displays all users in DocAve Online grouped by user type. The managed site collections and plans shared to each user are listed in respective tabs and are both listed under the username.
- **Object-based View**– This view displays all managed site collections and plans in respective tabs. The users who have the permissions to each managed site collection/plan are listed under the managed site collection/plan.

Applying User-Based View

User-based view in **Control Panel** > **Account Manager** displays all users in DocAve Online grouped by user type. The managed site collections/mailboxes and plans shared to each user are listed in respective tabs and are both listed under the username. In User-based View, you can view users and manage user permissions.

To invite, delete, activate or deactivate users, go to the **User Management** page in AvePoint Online Services. For details, refer to the AvePoint Online Services User Guide.

Changing User Permissions

To change user permissions, complete the following steps:

1. With **User-based View** activated, select a user from the user groups on the left. Details about the user will appear on the right, including their managed site collections/mailboxes and plans.
2. If you want to change permissions for a user, click **Change Permission** to the right of the window, then configure the following settings:
    a. **Specify User** – The user ID whose permission is being changed.
    b. **Managed Site Collections/Mailboxes** – Change user permissions by selecting/unselecting the checkboxes below the **Access** column for the specified managed site collections/mailboxes.

    Click **Next** when you finish the configurations.
    c. **Plans** – Change user permissions by selecting/unselecting the checkboxes below the **Access** column for the specified plans.

    In the current page, you can also perform the following actions:

    - Click **All Plans** in the message above the table to display all plans created in your DocAve Online. When you share the kind of plans (which are not associated with the site collections/mailboxes you selected in **Managed Site Collections**/**Managed Mailboxes**) and click **Next**, there will be a pop-up window asking you whether to share all site collections/Mailboxes related to this kind of plans to the invited user.
    - Click **Plans Associated with Selected Site Collections/Mailboxes** in the message above the table to display the plans that are associated with the site collections/mailboxes you selected in **Managed Site Collections**/**Managed Mailboxes**.
    - Filter the plans by the keyword. The keyword must be contained in the value of the **Plan Name**, **Description**, **Product**, or **Created By** columns. Enter the keyword for the plans you want to display in the **Input Keyword** text box and then click the magnifying glass ( ) button to search. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the plans in all pages whose columns contain the keywords will be

displayed, while **Search current page** means that only the plans in the current page whose names and descriptions contain the keywords will be displayed.

***Note:** The search function is not case sensitive.

Click **Next** when you finish the configurations.

d. **Overview** – Provide an overview of the e-mail address and the modified permissions.

e. Click **Finish** to finish the permission modifications.

Applying Object-Based View

Object-based view in **Control Panel** > **Account Manager** displays all managed site collections/mailboxes and plans in respective tabs. The users who have permission to each managed site collection/mailbox and plan are listed under the managed site collection/mailbox and plan. When using object-based view to view and manage user and permissions, you can change user permissions.

Changing User Permissions

To change user permissions, complete the following steps:

1. With Object-based View activated, click **Change Permission** on the ribbon.
2. In Change Permission, select a tab from the following tabs: Managed Site Collections, Managed Mailboxes, and Plans.
    - When selecting the **Managed Site Collections** tab, refer to the following steps:
        i. Locate the desired site collection that is listed under the **Authorized Site Collections** column. The users who have **Access** permission are displayed under this site collection.
        ii. To remove the user permission, unselect the Access checkbox or hover over the user and click the Remove User Permissions for Current Site Collection link.

        If the removed user has permissions for the plans that are related to the current site collection, there will be a pop-up window asking you whether to remove the permissions for those plans. It is required to remove the permissions for the plans related to the current site collection first in order to remove the permissions for the current site collection.
    - When selecting the **Managed Mailboxes** tab, refer to the following steps:
        i. Locate the desired mailbox listed under the **Authorized Mailboxes** column. The users who have **Access** permission are displayed under this mailbox.
        ii. To remove the user permission, unselect the **Access** checkbox or hover over the user and click **Remove User Permissions for Current Mailbox**.

If the removed user has permissions for the plans that are related to the current mailbox, there will be a pop-up window asking you whether to remove the permissions for those plans. It is required to remove the permissions for the plans related to the current mailbox first in order to remove the permissions for the current mailbox.

- When selecting the **Plans** tab, refer to the following steps:
    i. Locate the desired plan listed under the **Plan Name** column. The users who have **Access** permission are displayed under this plan.
    ii. To remove the user permission, unselect the **Access** checkbox or hover over the user and click the appeared **Remove Permissions** link.

3. Click **OK** to save changes, or click **Cancel** to cancel changes.

Standard User

Standard users can use the following two views to see the managed site collections and plans that have been shared with him or her:

- **User-based View** – This view displays all managed site collections/mailboxes and plans shared to the current user.
- **Object-based View** – This view displays all managed site collections/mailboxes and plans shared to the current user.

Support

This group is used for AvePoint Support representatives that are invited to your DocAve Online account when you need to ask for help and resolve issues. For more information on inviting AvePoint Support to help resolve issues, refer to Troubleshooting.

Managing Office 365 Account

Use the **Office 365 Account Manager** tab to create authentication profiles. An authentication profile contains the Office 365 user ID and the SharePoint center admin URL information. With it, you can quickly fill in a form when needed by selecting this previously created authentication profile.

To access the **Office 365 Account Manager** tab for DocAve Online, complete the following steps:

1. In Control Panel, click **Office 365 Account Manager** under the Office 365 Settings heading.
2. When finished with account management, click **Close** on the ribbon to close the **Office 365 Account Manager** page.

Configuring Your Own Storage as a Physical Device

Physical devices allow DocAve Online to store backup data. DocAve Online provides a default physical device that uses a default Microsoft Azure Storage device for storing backup data, and supports showing the backup data size, the used storage, and free space of the default physical device. If desired, you can configure a new physical device that uses your own storage to store the backup data. While you can create multiple physical devices for use in DocAve Online here, only one is necessary to perform a successful backup job.

Depending on where you want to store the backup data, DocAve Online has the capability to write to any FTP, SFTP, TSM, Microsoft Azure Storage, Amazon S3, Rackspace Cloud File, Dropbox, Box, and OneDrive devices. For full details and guidelines about using the physical device, refer to the Control Panel Reference Guide.

***Note**: DocAve Online supports specifying a folder in FTP/SFTP to store the data through configuring the **Folder Structure** field. This field is optional. In the **Root Folder** text box, enter the desired folder structure in FTP/SFTP where you would like to store the data (if the specified folder structure does not exist in FTP/SFTP, the folder structure will be created automatically). The data will be stored according to the specified folder structure. If you do not configure this field, the data will be stored in the FTP/SFTP root folder.

***Note**: For Microsoft Azure Storage, DocAve Online only supports writing backup data to the Block blobs storage type.

***Note**: Due to performance issues, AvePoint does not recommend using OneDrive for storage when using DocAve Online.

Configuring Export Locations

Export Location allows you to export job reports, Administration Reports (in Report Center), Auditor Reports (in Report Center), and the reports of Administrator to specific locations.

To access the **Export Location** tab for DocAve Online, click **Export Location** in **Control Panel**.

Managing Export Locations

In Export Location, you can create a new export location, view details about an export location, edit a previously configured export location, or delete a previously configured export location. For more information about creating or editing an export location, refer to Creating and Editing Export Locations.

To view details about an export location, select it from the list of previously configured export locations, and then click **View Details** on the ribbon. You will see the previously configured settings for this export location.

To edit a previously configured export location, select it from the list and then click **Edit** on the ribbon. For more information about editing the settings of this export location, refer to Creating and Editing Export Locations.

To delete an export location from DocAve Online, select it from the list of previously configured export locations, and then click **Delete** on the ribbon. A confirmation window will pop up and ask if you are sure you want to proceed with the deletion. Click **OK** to delete the selected export location, or click **Cancel** to return without deleting it.

Creating and Editing Export Locations

To create a new export location, click **Create** on the ribbon. To modify a previously configured export location, select the export location, and then click **Edit** on the ribbon. In the **Create a New Export Location** or **Edit Export Location** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this export location. Then enter an optional **Description** for future reference.
2. **Location Type** – Select the type for the export location that you are about to create.
    - **Storage** – The reports will be stored in a storage location.
        i. **Storage Type** – Select a storage type for the export location.
        ii. **Storage Type Configuration** – Configure the required configurations for the selected storage type. For more information, refer to the Physical Device section in the Control Panel Reference Guide
    - **SharePoint Online Document Library** – The reports will be stored in a document library.

i. **SharePoint Online Document Library** – Select the SharePoint Online document library where you want to store the exported report files.

- **Specify a document library** – Expand the tree and select your desired document library.
- **Each site in the selected scope** – Stores the report about each site to the document library of each site accordingly. Enter the document library name you want to use to store the exported report files in the text box. By default, the document library **DocAve Report Center Reports** is provided**.** The library will be created in each site in the selected scope.

  ***Note:** This configuration only take effect when you select site collection level nodes or site level nodes to export reports, and the document library in each site can only be used to store the Auditor Reports of Report Center.

3. Click **OK** on the ribbon to save your configurations, or click **Cancel** to go back to the **Export Location** interface without saving any configurations.

Troubleshooting

For help using DocAve Online, a Power User can invite a member of AvePoint Support to access their DocAve Online session to help troubleshoot. To do this, complete the following steps:

***Note:** After AvePoint Support completes troubleshooting, the Support user will remain in the Account Manager. To remove the Support user, a Power User can delete the Support user by navigating to **AvePoint Online Services** > **User Management** > **User-based View**, selecting the checkbox next to the Support's user ID, and then clicking **Delete** on the ribbon.

1. Log into DocAve Online and click **Invite Support** ( ) at the top-right of the window. A pop-up window appears.
2. On the **Invite Support** window, provide the following information:
    a. **Invite AvePoint Support** – Provide the product, issue type, severity, and details about your issue. Give as much detail as possible.
        - **Product** – Select the product type related to your issue from the drop-down list.
        - **Issue Type** – Choose your type of issue:
            - **General guidance** – Get general help using DocAve Online.
            - **Troubleshoot an issue** – Invite AvePoint Support to help you troubleshoot a problem with DocAve Online.
        - **Severity** – Define the severity of the issue by selecting a level on the scrollbar bug (1=Trivial, 5=Critical).
        - **Details** – Enter detailed information about your issue in the textbox, such as how often the issue appears, what process the issue affects, and what actions were performed before the issue appears.

          If the issue is related to a particular job, enter the corresponding Job ID in the text box. To add multiple Job IDs, separate the Job IDs with semicolon.
        - **Attachment** – If you have a file that will help explain or resolve your issue, click **Browse** and select your file.

          ***Note**: The maximum file size is 5 MB.
        - **Contact Option** – Choose your preferred method of contact:
            - **Phone** –Enter your phone number in the textbox.
            - **E-mail** –Enter your e-mail address in the textbox.

    b. **Plans** – Share plans with the Support user by selecting the checkboxes below the **Access** column for the specified plans.

In the current page, you can also filter the plans by the keyword. The keyword must be contained in the value of the **Plan Name**, **Description**, **Product**, or **Created By** columns. Enter the keyword for the plans you want to display in the **Input Keyword** text box and then click the magnifying glass ( ) button to search. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the plans in all pages whose columns contain the keywords will be displayed, while **Search current page** means that only the plans in the current page whose names and descriptions contain the keywords will be displayed.

***Note:** The search function is not case sensitive.

Click **Next** when you finish the configurations.

c. **Managed Site Collections/Mailboxes** – Share the desired managed site collections/mailboxes by selecting the checkboxes below the **Access** column for the specified managed site collection/mailbox.

   - Managed site collections/mailboxes represent the site collections/mailboxes registered to SharePoint Sites groups/Exchange Mailbox groups and managed by DocAve Online.
   - The Support user with **Access** permission for the site collections is able to manage the site collections/mailboxes when using the product suites in DocAve Online.

   Click **Next** when you finish the configurations.

d. **Overview** – Provide an overview of the issue description and the shared managed site collections/mailboxes and plans.

e. Click **Submit** to finish the invitation process. AvePoint Support will receive an e-mail notification to inform him/ her that he/ she is invited to help solve customer issues.

Submitting Feedback

We provide a platform to collect feedback, if you want to report bugs, give suggestions for product features, or provide comments about your DocAve Online experience. Refer to the following steps to submit feedback:

1. On the Home page of DocAve Online in the top-right corner, click the **Submit Feedback** ( ) button. The **Submit Feedback** window appears.

   If you would like to be contacted by an AvePoint representative after submitting feedback, check the **Would you like to be contacted by an AvePoint representative in regards to your issue?** checkbox at the top of the window.

2. On the top of the **Submit Feedback** pop-up window, click the stars to evaluate your DocAve Online experience.
3. Provide feedback in one or all of the three available feedback tabs: Bug Report, Interface Improvement, and Feature Suggestion. Refer to the appropriate section below for further details.

Bug Report

In the **Bug Report** tab, provide detailed information about the bug that you want to report:

1. **Product** – Select the products you were using when you found the bug/error. Select the checkboxes before the product names in the drop-down list.
2. **Bug Type** – Choose the type of the bug: **Logic** or **User Interface**. If you choose User Interface, select a specific type from the drop-down list: **Interaction**, **Spelling**, or **Grammar**.
3. **Severity** – Define the severity of the bug (1=Trivial, 5=Critical) by selecting a level on the scroll bar.
4. **Details** – Enter your own description to tell us the details of the bug (for example, how often the bug appears, what process the bug affects, and what actions were performed before the bug appears).

Click **Send Now** to submit your feedback.

Interface Improvement

In the **Interface Improvement** tab, you can provide feedback about your experience with the interface:

1. **Tree and Interface Performance** – Choose your evaluation for the performance of the data tree interface and SharePoint Online functions.
2. **How would you describe the DocAve Online Interface?** – Choose your evaluation of the DocAve Online interface.

3. **Additional Feedback** – Enter any additional feedback that you want to share with us in the provided text box.

Click **Send Now** to submit your feedback.

Feature Suggestion

In **Feature Suggestion**, you can provide suggestions on any of our product features.

1. **Product** – Choose the product that you would like to improve. Select the checkboxes before the product names in the drop-down list.
2. **Your Suggestion** – Enter your suggestion for the feature in the provided text box, providing as much detail as possible.

Click **Send Now** to submit your feedback.

Appendix A: Supported and Unsupported Features for DocAve Products

Refer to the following sections for details on the supported and unsupported features of the DocAve products available in DocAve Online.

Granular Backup and Restore

The following table provides a list of the supported and unsupported features for Granular Backup & Restore in DocAve Online.

Category	Feature		Support Status
Granular Backup	Ad Hoc Backup		Supported
	Plan Builder	Wizard Mode	Supported
		Form Mode	Supported
	Storage Policy		Supported
	Filter Policy		Supported
	Predefined Scheme		Supported
	Schedule Selection	No Schedule	Supported
		Select a predefined scheme	Supported
		Configure the schedule myself	Supported
	Granular Restore Level	Item	Supported
		Site	Unsupported
		Site Collection	Unsupported
	User Profile		Unsupported
	Workflow	Workflow Definition	Supported
		Workflow Instance	Unsupported
	Include Versions		Supported
	Data Compression	SharePoint Agent	Unsupported
		Media Service	Supported
	Data Encryption	SharePoint Agent	Unsupported
		Media Service	Supported
	Notification		Supported
	Associated Plan Group		Supported

Category	Feature			Support Status
	Agent Group			Unsupported
	Security Profile			Supported
	SharePoint 2013 Online App			Supported
	Backup Type	Full Backup		Supported
		Incremental Backup		Supported
		Differential Backup		Unsupported
	Job Report	Simplified		Supported
		Detailed		Supported
Granular Restore	Time-Based Restore	Filter by	Plan Filter	Supported
			Job Filter	Supported
			Time Range	Supported
		Display backup jobs in the calendar view		Supported
		Advanced Search	Site Collection	Supported
			Site	Supported
			App	Supported
			List	Supported
			Folder	Supported
			Item	Supported
			Attachment	Supported
			Document	Supported
	Object-Based Restore			Unsupported
	Restore Settings	Restore Type	In place restore	Supported
			Out of place restore	Supported
			Restore to file system	Unsupported
		Global Settings for Restoring Content, Property and Security	Global settings for container configuration	Supported
			Global settings for content configuration	Supported
		Security		Supported
		Property		Supported
		Restore Action	Merge source list to destination site	Supported
			Attach source site to destination site	Supported

Category	Feature			Support Status
			Attach source site to destination site collection	Supported
			Attach source list to destination site	Supported
			Preview	Supported
		User Mapping	Normal User Mapping	Supported
			Add a default destination user	Supported
			Add a place holder account to keep metadata even if the user no longer exists	Unsupported
		Language Mapping		Supported
		Domain Mapping		Unsupported
		Container Level Conflict Resolution		Supported
		Content Level Conflict Resolution		Supported
		Exclude User/Group Without Permission		Unsupported
		Job Report	Simplified	Supported
			Detailed	Supported
		Version Settings	Restore all versions	Supported
			Restore the latest _ version(s)	Supported
		List View		Supported
		User Profile		Unsupported
		Workflow	Workflow Definition	Supported
			Workflow Instance	Unsupported
		Item Depended Columns and Content Types		Supported
		Notification		Supported
		Schedule Selection	Restore immediately after wizard finishes	Supported
			Configure the schedule myself	Supported
		Include Recycle Bin Data		Unsupported
		Create Container ***Note**: When creating a site collection, DocAve Online only supports the creation of site collection in SharePoint 2013 Online.		Supported

Category	Feature		Support Status
		SharePoint 2013 Online APP ***Note**: To restore the backup apps, make sure the apps meet at least one of the conditions: • The app exists in the destination App Catalog. • The app has ever been installed in your organization.	Supported
		App Conflict Resolution — Skip	Supported
		App Conflict Resolution — Update App Only	Unsupported
		App Conflict Resolution — Replace App and AppData	Supported
Plan Manager	View Details		Supported
	Edit		Supported
	Delete		Supported
	Plan Group		Supported
	Test Run		Supported
	Run Now		Supported

Administrator

The following table provides a list of the supported and unsupported features for Administrator in DocAve Online.

Category	Feature	Option	Support Status
Item Version Level	Management - Contribute	Delete	Supported ***Note**: DocAve Online supports sending the deleted item versions to the Recycle Bin.
	Management - Statistics	Job Monitor	Supported
	Export Settings – Settings	Export Location	Unsupported
	Policy Enforcer	Create or Apply Profile	Unsupported
		Profile Manager	Supported
	Policy Enforcer – Report	Generate Report	Unsupported
	Policy Enforcer – Settings	Source Management	Supported
		Defined Group	Unsupported
		Filter Policy	Supported
		Policy Enforcer Database	Unsupported
	Policy Enforcer - Statistics	Job Monitor	Supported
File/Item Level	Management - Contribute	Admin Search	Supported
		Change Metadata	Unsupported
		Delete	Supported ***Note**: DocAve Online supports sending the deleted files or items to the Recycle Bin.
	Management -Statistics	Job Monitor	Supported
	Permission Tools	Grant Permissions	Supported
		Inherit Permissions	Supported
		Stop inheriting Permissions	Supported
		Edit User Permissions	Supported
		Remove User Permissions	Supported
	Security - Alert	Alert Me	Unsupported
	Security - Contribute	Item Permissions	Supported

Category	Feature	Option	Support Status
		Security Search	Supported
	Security - Permission	Grant Permission	Supported
		Inherit Permissions	Supported
		Stop Inheriting Permissions	Supported
	Security - Statistics	Job Monitor	Supported
	Export Settings – Settings	Export Location	Unsupported
	Policy Enforcer	Create or Apply Profile	Unsupported
		Profile Manager	Supported
	Policy Enforcer – Report	Generate Report	Unsupported
	Policy Enforcer – Settings	Source Management	Supported
		Defined Group	Unsupported
		Filter Policy	Supported
		Policy Enforcer Database	Unsupported
Folder Level	Management - Contribute	Admin Search	Supported
		Delete	Supported ***Note**: DocAve Online supports sending the deleted folders to the Recycle Bin.
		New Folder	Supported
		View Properties	Supported
		Edit Properties	Unsupported
	Management - Statistics	Job Monitor	Supported
	Permission Tools	Grant Permissions	Supported
		Inherit Permissions	Supported
		Stop inheriting Permissions	Supported
		Edit User Permissions	Supported
		Remove User Permissions	Supported
	Security - Alert	Alert Me	Unsupported
	Security - Contribute	Folder Permissions	Supported
		Security Search	Supported
	Security – Permission	Clone Permission (Clone Folder Permissions)	Unsupported
		Clone Permission (Clone User Permissions)	Supported

Category	Feature	Option	Support Status
		Grant Permissions	Supported
		Inherit Permissions	Supported
		Stop Inheriting Permissions	Supported
	Security - Statistics	Job Monitor	Supported
	Export Settings – Settings	Export Location	Unsupported
	Policy Enforcer	Create or Apply Profile	Unsupported
		Profile Manager	Supported
	Policy Enforcer – Report	Generate Report	Unsupported
	Policy Enforcer – Settings	Source Management	Supported
		Defined Group	Unsupported
		Filter Policy	Supported
		Policy Enforcer Database	Unsupported
	Policy Enforcer - Statistics	Job Monitor	Supported
List/Library Level	Configuration	Advanced Settings	Supported
		General Settings – Audience Targeting Settings	Supported
		General Settings – Column Default Value Settings	Unsupported
		General Settings – Metadata Navigation Settings	Supported
		General Settings – Pre-location View Settings	Unsupported
		General Settings – Rating Settings	Supported
		General Settings – RSS Setting	Supported
		Validation Settings	Supported
		Version Settings	Supported
		Look and Feel	Supported
	Management -Column	Indexed Column	Unsupported
	Management - Contribute	Admin Search	Supported
		Delete	Supported ***Note**: DocAve Online supports sending the deleted lists or libraries to the Recycle Bin.
		New Folder	Supported
	Management – General Management	Information Management Policy Settings	Unsupported
		Metadata and Keywords Settings	Supported

Category	Feature	Option	Support Status
		No Checked in Version Files	Supported
		Workflow Settings	Supported
	Management - Statistics	Job Monitor	Supported
	Permission Tools	Grant Permissions	Supported
		Inherit Permissions	Supported
		Stop inheriting Permissions	Supported
		Anonymous Access	Unsupported
		Edit User Permissions	Supported
		Remove User Permissions	Supported
	Security - Contribute	List/Library Permissions	Supported
		Security Search	Supported
	Security - Permission	Anonymous Access	Unsupported
		Clone Permissions (Clone List/Library Permissions)	Unsupported
		Clone Permissions (Clone User Permissions)	Supported
		Grant Permissions	Supported
		Grant Temporary Permissions	Supported
		Search Temporary Permissions	Supported
		Inherit Permissions	Supported
		Stop Inheriting Permissions	Supported
	Security – Share and Track	Alert Me	Unsupported
	Export Settings – Settings	Export Location	Unsupported
	Policy Enforcer	Create or Apply Profile	Unsupported
		Profile Manager	Supported
	Policy Enforcer – Report	Generate Report	Unsupported
	Policy Enforcer – Settings	Source Management	Supported
		Defined Group	Unsupported
		Filter Policy	Supported
		Policy Enforcer Database	Unsupported
	Policy Enforcer - Statistics	Job Monitor	Supported
Site Level	Configuration	Custom Properties	Unsupported
		Related Links Scope Settings	Unsupported
		RSS Setting	Supported

Category	Feature	Option		Support Status
		Search And Offline Availability		Supported
		Look and Feel	Quick Launch	Unsupported
			Site Theme	Unsupported
			Title, Description, and Icon	Unsupported
			Top Link Bar	Unsupported
			Tree View	Supported
	Management - Contribute	Admin Search		Supported
		Delete		Supported
		New List/Library		Supported
		New Subsite		Supported
	Management - Galleries	Master Page		Supported
		Site Columns		Supported
		Site Content Types		Supported
	Management-General Management	Regional Settings		Supported
		Reset to Site Definition		Supported
		Site Features		Supported
	Management-Search Gallery	Search Duplicate Files		Unsupported
		Search Web Part		Supported
	Management – Check	Check Broken Link		Unsupported
	Management - Statistics	Job Monitor		Supported
	Permission Tools	Create Group		Supported
		Grant Permissions		Supported
		Inherit Permissions		Supported
		Stop inheriting Permissions > Break Inheritance for Selected Node		Supported
		Stop inheriting Permissions > Break Inheritance for Sub-nodes		Supported
		Anonymous Access		Unsupported
		Permission Levels		Supported
		Edit User Permissions		Supported
		Remove User Permissions		Supported
	Security-Account	Dead Account Cleaner		Unsupported

Category	Feature	Option		Support Status
	Security-Contribute	Security Search		Supported
		Users and Permissions	People and Groups	Supported
			Site Permissions	Supported
	Security-Permission	Anonymous Access		Unsupported
		Clone Permission - Clone Site Permission		Unsupported
		Clone Permission - Clone User Permission		Supported
		Create Group		Supported
		Edit User Permissions		Unsupported
		Grant Permissions		Supported
		Grant Temporary Permissions		Supported
		Search Temporary Permissions		Supported
		Inherit Permissions		Supported
		Permission levels		Supported
		Stop inheriting Permissions		Supported
	Security-Share and Track	Alert Me		Unsupported
	Export Settings – Settings	Export Location		Unsupported
	Policy Enforcer	Create or Apply Profile		Supported
		Profile Manager		Supported
	Policy Enforcer – Report	Generate Report		Supported
	Policy Enforcer – Settings	Source Management		Supported
		Defined Group		Unsupported
		Filter Policy		Supported
		Policy Enforcer Database		Unsupported
	Policy Enforcer - Statistics	Job Monitor		Supported
Site Collection Level	Configuration	Custom Properties		Unsupported
		Deploy Site Maximum Depth		Supported
		Quotas and Locks		Unsupported
		RSS		Supported
		Visual Upgrade		Unsupported
		Help Settings		Supported
		Search Settings - Search Keywords		Unsupported
		Search Settings - Search Scope		Unsupported

Category	Feature	Option		Support Status
		Search Settings - Search Setting		Unsupported
		SharePoint Designer Settings		Supported
	Management - Check	Check Broken Link		Unsupported
	Management - Contribute	Admin Search		Supported
		Delete		Unsupported
		Move		Unsupported
		New Site		Supported
	Management - Galleries	Site Columns		Supported
		Solutions		Supported
		Themes		Supported
		Web Part		Supported
	Management - General Management	Content Type Publishing		Supported
		Portal Site Connection		Supported
		Site Collection Features		Supported
	Management-Search Gallery	Search Duplicate Files		Unsupported
		Search Web Part		Supported
	Management Statistics	Job Monitor		Supported
	Permission Tools	Create Group		Supported
		Grant Permissions		Supported
		Anonymous Access		Unsupported
		Permission Levels		Supported
		Site Collection Administrators		Supported
		Delete User/Groups from Site Collection		Supported
		Edit User Permissions		Supported
		Remove User Permissions		Supported
	Security - Account	Dead Account Cleaner		Unsupported
	Security - Contribute	Security Search		Supported
		Users and Permissions	People and Groups	Supported
			Site Permissions	Supported
	Security - Permission	Anonymous Access		Unsupported
		Clone Permission - Clone Site Permission		Unsupported
		Clone Permission - Clone User Permissions		Supported

Category	Feature	Option	Support Status
		Create Group	Supported
		Delete Users and Groups	Supported
		Edit User Permissions	Supported
		Export Group For Editing	Supported
		Grant Permissions	Supported
		Grant Temporary Permissions	Supported
		Search Temporary Permissions	Supported
		Permission Levels	Supported
		Site Collection Administrators (Primary and Secondary Administrator)	Unsupported
		Site Collection Administrators (Site Collection Administrator)	Supported
		Stop inheriting Permissions	Supported
	Users and Permissions	People and Groups	Supported
	Export Settings – Settings	Export Location	Unsupported
	Policy Enforcer	Create or Apply Profile	Supported
		Profile Manager	Supported
	Policy Enforcer – Report	Generate Report	Supported
	Policy Enforcer – Settings	Source Management	Supported
		Defined Group	Unsupported
		Filter Policy	Supported
		Policy Enforcer Database	Unsupported
	Policy Enforcer - Statistics	Job Monitor	Supported
SharePoint Sites Group Level	Management - Contribute	New Site Collection	Supported

Content Manager

The following table provides a list of the supported and unsupported features for Content Manager in DocAve Online.

Feature	Option		Support Status
Content Management	Export		Unsupported
	Import		Unsupported
Method	Copy		Supported
	Move		Supported
Plan Builder	Wizard Mode		Supported
	Form Mode		Supported
Action	Attach		Supported
	Merge		Supported
	Preview		Supported
Backup Environment Before Running Plan and Rollback	Backup the Destination Environment		Supported
	Backup the Source Environment		Supported
	Rollback		Supported
	Backup Data Retention		Unsupported
Configuration	Copy/Move Configuration		Supported
Content	Copy/Move Content		Supported
Security	Copy/Move Security		Supported
	Exclude user/group without permissions		Unsupported
User Profile			Unsupported
Include Versions			Supported
Workflow	Workflow Definition		Supported
	Workflow Instance		Unsupported
Managed Metadata Service Setting	Copy Managed Metadata Service	Term	Unsupported
		Term Set	

Feature	Option		Support Status
		Managed Metadata Service	***Note**: There is no option on the DocAve Online Content Manager interface. DocAve Online Content Manager supports copying or moving terms and terms sets by default.
Preserve the Null Column Values			Supported
Folder Structure Management			Unsupported
Data Compression			Unsupported
Data Encryption			Unsupported
Delete Source Checked Out Documents			Supported
Filter Policy			Supported
Domain mapping			Unsupported
Language mapping			Supported
User mapping			Supported
Content Type Mapping			Supported
Template Mapping			Unsupported
Column Mapping			Supported
List Name Mapping			Unsupported
Source Documents/Items Deleted Method	Automatically		Supported
	Manually		Supported
Container Level Conflict Resolution	Skip		Supported
	Merge		Supported
	Replace		Supported
Content Level Conflict Resolution	Skip		Supported
	Overwrite		Supported
	Overwrite by Last Modified Time		Supported

Feature	Option	Support Status
	Append	Unsupported
Notification		Supported
Associated Plan Group		Supported
Schedule		Supported
Job Restriction		Unsupported
Agent Group		Unsupported
Create Container ***Note**: When creating a site collection, DocAve Online only supports the creation of site collection in SharePoint 2013 Online.		Supported
Advanced Search on the tree ***Note**: DocAve Online Content Manager only supports Advanced Search for the following nodes on the tree: **Sites**, **Lists**, and **Folders**.		Supported
Extender/Connector Data(In configuration file)	Migrate the real content of extender/connector(In configuration file)	Unsupported

Replicator

The following table provides a list of the supported and unsupported features for Replicator in DocAve Online.

Category	Feature	Option	Support Status
Offline Replicator	Data Export		Unsupported
	Data Import		Unsupported
Online Replicator	Create Container ***Note**: When creating a site collection, DocAve Online only supports the creation of site collection in SharePoint 2013 Online.		Supported
	Advanced Search on the tree ***Note**: DocAve Online Replicator only supports Advanced Search for the following nodes on the tree: **Sites**, **Lists**, and **Folders**.		Supported
	Mapping Status		Supported
	Notification		Supported
	Plan Group		Supported
	Schedule		Supported

Category	Feature	Option		Support Status
Profile Settings - Replication Options	Configuration	Site Collection Level	Site Collection Features and Properties	Supported
			Site Collection Search Scopes and Search Keywords	Unsupported
		Site Level		Supported
		List Level		Supported List Alerts: Unsupported Personal Views: Unsupported
	Content	Receive Deletions from Data Destination		Supported
		Metadata Service		Unsupported ***Note**: There is no option on the DocAve Online Replicator interface. DocAve Online Replicator supports replicating terms and terms sets by default.
		User Profiles		Unsupported
		Workflow Definition		Supported
		Workflow Instance		Unsupported
	Security	Site Collection Level		Supported
		Site Level		Supported
		List Level		Supported
		Folder Level		Supported
		Item Level		Supported
		Receive Security Changes from Data Destination (in two-way replication)		Supported
		Enable Sync Deletions for Users and Groups		Supported
		Include the Groups Without Permissions		Unsupported
		Enable Sync Deletions for Permissions and Permission Levels		Unsupported
Profile Settings – Conflict Options	Configuration -Conflict Resolution	Data source always wins		Supported
		Data destination always wins		Supported

Category	Feature	Option	Support Status
	Configuration – Conflict Action	Skip	Supported
		Overwrite	Supported
	Content - Conflict Resolution	Data source always wins	Supported
		Data destination always wins	Supported
		Item with latest modification time wins	Supported
		Item with higher version number wins	Supported
	Content - Conflict Action	Skip	Supported
		Overwrite	Supported
		Manual conflict resolution	Supported
	Content - Conflict Notification	Item Creator	Unsupported
		Last Modifier of the Final Version	Unsupported
		Site Collection Administrator	Unsupported
		E-mail Address	Supported
		User Column	Unsupported
Profile Settings- Filter Options	Filter Policy		Supported
Profile Settings – Mapping Options	Domain Mapping		Unsupported
	Language Mapping		Supported
	User Mapping		Supported
Profile Settings – Advanced Options	Data Compression		Unsupported
	Data Encryption		Unsupported
	Backup Before Replication		Supported
	Concurrent Threads		Unsupported
	Enable Byte-level		Unsupported
	Network Control		Unsupported
Replicator Database			Unsupported
Queue Tools	Add New Mapping		Supported
	Enable Mapping	Disable	Supported
		Enable	Supported
	Mapping Order		Supported
	Mapping Type	One Way	Supported
		One-way Pull	Unsupported
		Two Way	Supported

Category	Feature	Option	Support Status
	Profile	Customized Profile	Supported
	Real-Time		Unsupported
	Source Agent Group		Unsupported
	Destination Agent Group		Unsupported
Run Options	Full Replication		Supported
	Incremental Replication	Replicate Deletion	Supported
		Replicate Modification	Supported
		Use a Special Reference Time	Supported
Export and Import Online Plan			Unsupported
Security Trimming			Supported
Implicit and Explicit	Mapping 1: site collection level. Mapping 2: list level		Supported
Version Level	Document	Major Version	Supported
		Major Version and Minor Version	Supported
	Item	Major Version	Supported
Rename	List Rename		Full Replication: Unsupported Incremental Replication: Supported
Include and Exclude	Include New		Supported
	Exclude Site		Supported
One-way Pull			Unsupported
Replication Details			Unsupported
Mapping Status			Unsupported
Publishing Mode			Unsupported
Cross Version			Unsupported

Report Center

The following table provides a list of the supported and unsupported features for Report Center in DocAve Online.

Category	Feature	Option	Support Status
Usage Report	Search Usage		Unsupported
	Site Visitors and Activity		Unsupported
	Checked-Out Documents		Unsupported
	Page Traffic		Unsupported
	Referrers		Unsupported
	Last Accessed Time		Unsupported
	Failed Login Attempts		Unsupported
	Workflow Status		Unsupported
	SharePoint Alerts		Unsupported
	Download Ranking		Unsupported
	Site Activity Ranking		Unsupported
	Active Usage		Unsupported
Infrastructure Reports	SharePoint Services		Unsupported
	CPU/Memory Usage		Unsupported
	Networking		Unsupported
	SharePoint Topology		Unsupported
	SharePoint Search Services		Unsupported
	Environment Search		Unsupported
	Site Collection Comparison		Unsupported
	Site Collection Load Time		Unsupported
	Storage Trends		Unsupported
	Storage Analyzer		Unsupported
	User Storage Size		Unsupported
Administration Reports	Configuration Reports		Supported
	Best Practice Reports		Unsupported
Compliance Report	User Lifecycle		Supported
	List Access		Unsupported
	List Deletion		Supported

Category	Feature	Option		Support Status
	Permission Changes			Supported
	Site Access			Supported
	Item Lifecycle			Supported
	Content Type Changes			Supported
	Custom Report			Supported
	Term Store Changes			Unsupported
	Content Type Usage			Unsupported
	Information Management Policies			Unsupported
	Upcoming Content Expiration			Unsupported
	Run Report		Run Report Only	Supported
			Save Profile and Run Report	Supported
	Export to Datasheet	Report Format	CSV	Supported
			PDF	Unsupported
			XLSX	Unsupported
		Export Settings	Export to local immediately	Unsupported
			Export to a configured export location	Supported
DocAve Reports	DocAve Topology			Unsupported
	Performance Monitoring			Unsupported
	Disk Space Monitoring			Unsupported
	Job Performance Monitoring			Unsupported
	DocAve Auditor			Supported
Settings	Data Collection			Unsupported
	IIS Logging			Unsupported
	Reporting Service			Unsupported
	Cross-Farm Service Configuration			Unsupported
	Audit Controller	Wizard Mode		Supported
		Form Mode		Supported
		Edit Rules Individually		Supported
		Trickle Down		Unsupported
		Apply Rule	Filter Policy	Unsupported
			Operation Settings	Supported

Category	Feature	Option			Support Status
			Schedule		Supported
		Retrieve Data	Filter Policy	URL	Supported
				User	Supported
				AD Profile	Unsupported
				Site Collection	Unsupported
			Schedule		Supported
			Advanced Rules	Retrieve IIS Logs	Unsupported
				Log source IP	Unsupported
				Retrieve Deleted Site Collection Data (Only for web application level)	Unsupported
				Delete auditor data in SharePoint older than _ days	Supported
				Track object last accessed time	Unsupported
		Notification			Supported
	Audit Pruning				Supported
	Manage Feature				Unsupported
	Export Location	UNC Path			Unsupported
		SharePoint Document Library			Supported ***Note**: DocAve Online Configuration Reports does not support exporting the reports to the document library of each site.
Advanced Search on the tree ***Note**: DocAve Online Report Center only supports Advanced Search for the following nodes on the tree: **Sites**, **Lists**, and **Folders**.					Supported

Deployment Manager

The following table provides a list of the supported and unsupported features for Deployment Manager in DocAve Online.

Category	Feature		Support Status
Tree Node	Design Elements	Web Application	Unsupported
		Site Collection	Supported
		Site	Supported
		Site Setting	Supported
		SharePoint Designer Objects	Supported
		List	Supported
		List Setting	Supported
		Folder	Supported
		File/Item	Supported
		Content Type	Supported
		Apps	Supported
		Column	Supported
	Solution	User Solution	Supported
		Farm Solution	Unsupported
	Web Front End	IIS Site Files	Unsupported
		Global Assembly Cache	Unsupported
		Custom Features	Unsupported
		SharePoint Site Definitions	Unsupported
		File System	Unsupported
	Managed Metadata Service	Term Store	Unsupported
		Content Type Hub	Unsupported
Basic Features	Compare	Design Elements	Supported
		Solution	Unsupported
		Web Front End	Unsupported
		Managed Metadata Service	Unsupported
	Advanced Search on the tree ***Note**: DocAve Online Deployment Manager only supports Advanced Search for the following nodes on the tree: Sites, Lists, and Folders.		Supported

Category	Feature			Support Status
	SharePoint Management Shell			Unsupported
	Solution Tools			Unsupported
	App Tools			Unsupported
	One to Many			Supported
	Download Queues\Upload Queues			Unsupported
	Solution Dependency Check			Unsupported
	Offline Deployment			Unsupported
	Rollback			Supported
Queue Setting	Conflict Resolution	Container Level	Skip	Supported
			Merge	Supported
			Replace	Supported
		Content Level	Skip	Supported
			Overwrite	Supported
			Overwrite by Last Modified Time	Supported
	Apps	Do Not Include Apps		Supported
		Include Apps	Skip	Supported
			Update App Only	Unsupported
			Replace App and AppData	Supported
	Filter Policy	Source		Supported
		Destination		Supported
	Source Content Settings	Include Security		Supported
		Include User Profile		Unsupported
		Include User Content		Supported
	Mappings	Domain Mapping		Unsupported
		User Mapping		Supported
		Language Mapping		Supported
	Workflow	Include Workflow Definition		Supported
	Deploy to Relative Lists and Sites	Deploy the content type to relative lists and sites		Supported
	Manage Metadata Service Settings	Do not copy		Unsupported
		Terms only		Unsupported
		Term sets		Unsupported
		Managed Metadata Service		Unsupported

Category	Feature		Support Status
	Preserver the Null Column Values	Yes	Supported
		No	Supported
	Extender/Connector Data(In configuration file)	Migrate the real content of extender/connector(In configuration file)	Unsupported
	Deploy the item dependent columns and content types to maintain	Do not deploy the columns and content types, or the corresponding items	Supported
		Overwrite the columns and content types	Supported
		Append the columns and content types to destination	Supported
	Do not deploy the item dependent columns and content types		Supported
Plan Setting	Schedule		Supported
	Notification		Supported
	Plan Group		Supported
Others	Agent Group	Registered SharePoint Sites	Unsupported
	Security Trimming	Registered SharePoint Sites	Supported

Archiver

The following table provides a list of the supported and unsupported features for Archiver in DocAve Online.

Category	Feature	Option		Support Status
Archiver	Rule ***Note**: Archiver rules cannot be applied to SharePoint sites group level by DocAve Online Power Users.			Supported
	Profile			Supported
	What type of content would you like to archive?	Document		Supported
		Document Version		Supported
		Item		Supported
		Item Version		Supported
		Attachment		Supported
		List		Supported
		Site		Supported
		Site Collection		Supported
	What would you like to do with the SharePoint data?	Archive and remove data from SharePoint		Supported
		Archive and keep data in SharePoint		Unsupported
		Move and declare documents as SharePoint records		Unsupported
	Would you like to export the SharePoint data before archiving?	Export before archiving		Unsupported
		Export without archiving		Unsupported
		Export type selection	Autonomy Integration	Unsupported
			Concordance Load File	Unsupported
			EDRM XML	Unsupported
	Data Compression			Supported
	Data Encryption			Supported
	Enable manual approval			Unsupported
	Storage policy			Supported
	Settings	Processing Pool		Unsupported
		Workflow		Supported

Category	Feature	Option		Support Status
		Notification		Supported
		Schedule		Supported
		Incremental Scan		Unsupported
	Archiver Database			Supported ***Note**: DocAve Online Archiver supports configuring a Microsoft Azure Storage table to store data instead of a database.
	Archiver Index Device			Supported ***Note**: Moving Archiver index device will start a Move Index job that moves index files from the original index device to the new one.
	Test Run			Unsupported
Archiver Restore	General Mode	Advanced Search		Supported
		In place restore ***Note**: For a site collection that has been archived, a SharePoint Sites Group can be selected for this site collection in the Archiver Restore job.		Supported
		Restore to file system	Keep original format	Unsupported
			In Concordance format	Unsupported
			EDRM XML format	Unsupported
	Full Text Index Mode	Advanced Search		Unsupported
		Restore to file system	In Concordance format	Unsupported
			EDRM XML format	Unsupported
	Restore Settings	Security		Supported
		Property		Supported
		Conflict Resolution	Skip	Supported
			Overwrite	Supported

Category	Feature	Option	Support Status
		Workflow	Supported
		Notification	Supported
		Schedule Settings	Supported
	What type of archived content would you like to restore?	Site Collection	Supported
		Site	Supported
		List/Library	Supported
		Folder	Supported
		Document	Supported
		Document Version	Supported
		Item	Supported
		Item Version	Supported
		Attachment	Supported
Full Text Index			Unsupported
Retention			Supported

Control Panel

The following table provides a list of the supported and unsupported features for Control Panel in DocAve Online.

Category	Feature	Support Status
Monitor	Manager Monitor	Unsupported
	Agent Monitor	Unsupported
System Options	General Settings	Unsupported
	Security Settings	Unsupported
Authentication Manager		Unsupported
Account Manager	Add Group	Unsupported
	Edit Group	Unsupported
	Show User(s)	Unsupported
	Delete Group	Unsupported

Category	Feature				Support Status
	Add User				Unsupported
	View Details				Unsupported
	Edit User				Unsupported
	Delete User				Unsupported
	Activate				Unsupported
	Deactivate				Unsupported
	Import in Bulk				Unsupported
	Permission Level				Unsupported
	Current Logon Account (s)				Unsupported
	Authentication Manager				Unsupported
	User-based View	Add User			Unsupported
		Change Permission	Specify User Type		Unsupported
			Managed Site Collections		Supported
			Plans		Supported
		Remove from Group			Unsupported
		Activate			Unsupported
		Deactivate			Unsupported
		Audit Report			Unsupported
	Object-based View	Change Permission	Managed Site Collections		Supported
License Manager					Unsupported
Update Manager					Unsupported
Agent Group					Unsupported
User Notification Settings	Outgoing E-mail Settings				Unsupported
	Receive E-mail Settings	Create Notification Profile	Type	Global Report	Supported
				Service Report	Unsupported
			Notification Address	Summary Report Level	Supported
				Detailed Report Level	Supported
				Service Report	Unsupported
			Report Settings	Summary Report Level	Supported
				Detailed Report Level	Supported
				Send All Logs to Recipient	Unsupported

Category	Feature				Support Status
				Message Format	Supported
		Edit Notification Profile			Supported
		Delete Notification Profile			Supported
		Set as Default Profile			Supported
Job Pruning					Unsupported
Job Performance Alert					Unsupported
Log Manager					Unsupported
SharePoint Sites	Scan Site Collections				Supported
	Batch Import				Supported
	Single Site Collection				Supported
	Add Site Collection				Supported
	Remove Site Collection				Supported
	View Site Collection Details				Unsupported
	Edit Site Collection				Unsupported
	Reconnect Site Collection				Supported
	New SharePoint Sites Groups				Supported
	Delete SharePoint Sites Groups				Supported
	Edit SharePoint Sites Group				Supported
	View SharePoint Sites Group Details				Supported
Office 365 Account Profile Manager	Create Profile				Supported
	Edit Profile				Supported
	Delete Profile				Supported
Security Profile	Create Profile	Encryption Method	AES		Supported
			DES		Unsupported
			Blowfish		Unsupported
		Encryption Length	64		Unsupported
			128		Supported
			256		Supported
		Encryption Key	Automatically generate encryption key		Supported
			Update the key every_Years/Months		Unsupported
			Generate encryption key from seed		Supported
	Edit Profile				Supported

Category	Feature				Support Status
	Delete Profile				Supported
	Import Profile	Security Profile Password			Supported
	Export Profile	Security Profile Password			Supported
Managed Account Profile					Unsupported
Solution Manager					Unsupported
Storage Configuration	Physical Device	Create Physical Device	Storage Type	Net Share	Unsupported
				Microsoft Azure Storage	Supported
				Amazon S3	Supported
				Rackspace Cloud File	Supported
				FTP	Supported (Including folder path)
				Box	Supported
				Caringo Storage	Unsupported
				DELL DX Storage	Unsupported
				Dropbox	Supported
				EMC Atmos	Unsupported
				EMC Centera	Unsupported
				Google Drive	Unsupported
				HDS Hitachi Content Platform	Unsupported
				AT&T Synaptic	Unsupported
				OneDrive	Supported
				TSM	Supported
				SFTP	Supported
			Storage Type Configuration		Supported
			Space Threshold		Unsupported
		View Details			Supported
		Edit Physical Device			Supported
		Delete Physical Device			Supported
		Refresh			Supported
		Data Usage Dashboard			Supported
			Data Storage Type	Logical Device	Supported

Category	Feature					Support Status
	Logical Device	Create Logical Device			BLOB Storage Device	Unsupported
					Redundant Backup Data Storage Device	Unsupported
					Concurrent Storage Device	Unsupported
			Storage Type			Supported
			Add Physical Device		Add one physical device	Supported
					Secondary Storage Group	Unsupported
					Synchronization Method: Asynchronous; synchronous	Unsupported
			Configure Folder Structure			Unsupported
		View Details				Supported
		Edit Logical Device				Supported
		Delete Logical Device				Supported
	Storage Policy	Create Storage Policy	Primary Storage			Supported
			Media Service			Unsupported
			Enable Retention Rule			Supported
			Storage Policy Type		Backup Type	Supported
					Archive Type	Supported
			Notification			Supported
			Backup Retention Rule	Retention rule	Keep the last cycle	Supported
					Keep the last full backup	Supported
					Keep the cycle in _ days/weeks/months	Supported
					Keep the full backup in _ days/weeks/months	Supported
					Do not perform actions on any jobs meeting the retention rule that have stopped, failed, or finished with exception	Unsupported
				Trigger Data Retention	Before the backup job starts	Unsupported
					After the backup job completes	Unsupported
				Select the	Full Backup	Unsupported
					Incremental Backup	Unsupported

Category	Feature							Support Status
				backup types to trigger data retention	Differential Backup			Unsupported
				Trigger data when a backup is	Finished			Supported
					Finished with Exception			Supported
				Action	Delete the data			Supported
					Remove the job			Supported
					Move the data to logical device			Supported
					Custom Action			Unsupported
			Archive Retention Rule		Schedule	Start time		Supported
						Interval		Supported
					Retention Rule	Keep the last _ days/weeks/months		Supported
					Action	Delete the data		Supported
						Remove the job		Supported
						Pre-scan expiring retention policies of archived data		Unsupported
						Move the data to logical device		Supported
		View Details						Supported
		Edit Storage Policy						Supported
		Delete Storage Policy						Supported
Data Manager								Unsupported
Index Manager								Unsupported
Export Location			Create Export Location		Farm Selection			Unsupported
					Path			Unsupported
					Location Type	Storage		Supported

Category	Feature				Support Status
				SharePoint Online Document Library	Supported
	View Details				Supported
	Edit Export Location				Supported
	Delete Export Location				Supported
Filter Policy	Create Filter Policy	Filter Group Level	Site Collection		Supported
			Site		Supported
			List/Library		Supported
			Folder		Supported
			Item		Supported
			Document		Supported
			Attachment		Supported
		Rule	URL		Supported
			Name		Supported
			Title		Supported
			Size		Supported
			Modified Time		Supported
			Created Time		Supported
			Modified By		Supported
			Created By		Supported
			Content Type: Name		Unsupported
			Content Type: ID		Unsupported
			Primary Administrator		Supported
			Template Name		Supported
			Template ID		Supported
			Column		Unsupported
			Column: Text		Supported
			Column: Number		Supported
			Column: Yes/No		Supported
			Column: Date and Time		Supported
			Custom Property: Text		Supported

Category	Feature					Support Status
			Custom Property: Number			Supported
			Custom Property: Yes/No			Supported
			Custom Property: Date and Time			Supported
			Version			Supported
			Last Accessed Time			Unsupported
			File Extension			Unsupported
			Workflow			Unsupported
	View Details					Supported
	Edit Filter Policy					Supported
	Delete Filter Policy					Supported
Host Profile						Unsupported
Mapping Manager	Domain Mapping					Unsupported
	User Mapping	Create User Mapping	Customize settings if the user does not exist in destination	Add a default destination user	Source Default User	Supported
					Target Default User	Supported
				Add a place holder account to keep metadata even if the user no longer exists		Unsupported
			Mapping Rules			Supported
		View Details				Supported
		Edit User Mapping				Supported
		Delete User Mapping				Supported
		Import User Mapping				Supported
		Export User Mapping				Supported
	Language Mapping	Create Language Mapping	Source and Target Language			Supported
			Mapping Rules			Supported
		View Details				Supported
		Edit Language Mapping				Supported
		Delete Language Mapping				Supported
		Import Language Mapping				Supported
		Export Language Mapping				Supported
		Create Content Type Mapping	Condition	Site Condition		Supported
				List Condition		Supported

Category	Feature					Support Status
	Content Type Mapping		Add Content Type Mapping			Supported
		View Details				Supported
		Edit Content Type Mapping				Supported
		Delete Content Type Mapping				Supported
		Import Content Type Mapping				Supported
		Export Content Type Mapping				Supported
	Column Mapping	Create Column Mapping	Condition	Site Condition		Supported
				List Condition		Supported
				Item Condition		Supported
			Column Mapping	Column Type	Same Type	Supported
					Change to Destination	Supported
					Change to Managed Metadata	Supported
					Change to Lookup	Supported
				Add Value Mapping		Supported
				Advanced	Use internal column name	Supported
		View Details				Supported
		Edit Column Mapping				Supported
		Delete Column Mapping				Supported
		Import Column Mapping				Supported
		Export Column Mapping				Supported
	Template Mapping					Unsupported
	Group Mapping					Unsupported
	List Name Mapping					Unsupported

Job Monitor

The following table provides a list the supported and unsupported features for Job Monitor in DocAve Online.

Category	Feature			Support Status
Scheduled Job Monitor				Supported
View	List View	View Details		Supported
		Download	Download Job Details	Supported
			Download Job Logs	Unsupported
		Delete	Delete Job	Supported
			Delete Content	Supported
			Delete job and backup data	Supported
		Pause		Unsupported
		Stop		Supported
		Resume		Unsupported
		Start		Supported
		Re-Sync		Unsupported
		Data Range		Supported
		Module		Supported
		Rollback		Supported
		Report Collector		Unsupported
		Maintenance		Unsupported
		Search Result		Supported
		Download Report		Supported
		Orphan Site Deletion		Unsupported
		Dead Account Deletion		Unsupported
		Rollback Changes		Unsupported
		Web Part Management		Unsupported
		Duplicate File Search		Unsupported
		View Mappings		Supported
		Additional Features for Report Center Job	View Workflow Status Report	Unsupported
			View SharePoint Alerts Reports	Unsupported
			View Last Accessed Time Report	Unsupported

Category	Feature			Support Status
			View Storage Analyzer Report	Unsupported
			View Best Practice Reports	Unsupported
			View User Lifecycle Reports	Supported
			View List Access Reports	Unsupported
			View Item Lifecycle Reports	Supported
			View Site Actions Reports	Unsupported
			View List Deletion Reports	Supported
			View Permission Changes Reports	Supported
			View Content Type Changes Reports	Supported
			View Custom Reports	Supported
			View Term Store Changes Reports	Unsupported
			View Content Type Usage Reports	Unsupported
		Additional Features for eDiscovery Job	Search Result	Unsupported
	Calendar View			Supported
Report Location	Use net share path as the report location			Unsupported
Search Result				Supported
Scheduled Job Monitor	Calendar View		Enable Scheduled Job	Supported
			Disable Scheduled Job	Supported
	List View			Supported
Job Pruning				Unsupported
Job Performance Alert				Unsupported

Plan Group

The following table provides a list of the supported and unsupported features for Plan Group in DocAve Online.

Category	Feature		Support Status
Create Plan Group	Group Type	Sequential	Supported
		Parallel	Supported
	Schedule	No Schedule	Supported
		Configure the schedule	Supported

Category	Feature		Support Status
			***Note**: Only supports a common schedule.
		Disable the schedule for each plan	Unsupported
View Details			Supported
Edit Plan Group			Supported
Delete Plan Group			Supported
Run Now			Supported

Welcome Page

The following table provides a list of the supported and unsupported features for Welcome Page in DocAve Online.

Category	Feature	Support Status
Invite Support		Supported
Submit Feedback		Supported
My Settings	E-mail Address	Supported
	Language Preference	Supported
Office 365 Registration Wizard	SharePoint Online Site Collections	Supported
	Exchange Online Mailboxes	Supported

AvePoint Online Services

The following table provides a list of the supported features for DocAve Online in AvePoint Online Services.

Category	Feature	Support Status
License Information	View License Information	Supported
Announcement	View Announcement	Supported
User Management	View User	Supported
	Add User	Supported
	Edit User	Supported
	Deactivate User	Supported
	Activate User	Supported
	Unlock User	Supported
	Delete User	Supported
Authentication Management	Create Office 365 Authentication Profile	Supported
	Edit Office 365 Authentication Profile	Supported
	Delete Office 365 Authentication Profile	Supported
User Synchronization		Supported
Submit Feedback		Supported
My Profile	Edit Contact Information	Supported
	Reset Password	Supported

Appendix B: Advanced Search

Advanced Search provides a quick method to locate specific objects or data to restore within the folder level and item level. You can use Advanced Search in the Time-based Restore method.

4. On the **Restore Wizard** tab within the **Data Selection** step, select the checkboxes next to the object names. The search scope is located within the selected object levels.
5. In the **Search** group on the ribbon, click **Advanced Search**. The **Advanced Search** page appears.
6. Click **Add a Filter Category** and select a level from the drop-down list: **Folder** or **Item**.
7. Click **Add a Criterion** to add a criterion and configure the settings of rule, condition, and value. Refer to the table below for more information about each rule. The value supports the wildcard: *.

Level	Rule	Condition	Value	Result
Folder	Name	Matches	A	Searches for the folder whose name matches **A**.
		Equals	folderA	Searches for the folder whose name equals **folderA**.
Item	Title	Contains	A	Searches for the item whose title contains **A**.
		Does Not Contain	A	Searches for the item whose title does not contain **A.**
		Equals	A	Searches for the item whose title is **A.**
		Does Not Equal	A	Searches for the item whose title is not **A.**
	Attachment	Has Attachment	Yes	Searches for the item that has attachment.
	Category	Contains	A	Searches for the item whose category contains A.
		Does Not Contain	A	Searches for the item whose category does not contain **A.**
		Equals	A	Searches for the item whose category is **A.**
		Does Not Equal	A	Searches for the item whose category is not **A.**
	Send Time	Before	2015-02-10 16:40:00 (UTC+08:00) Beijing, Chongqing,	Searches for the item whose send time is earlier than 2015-02-10 16:40:00 (UTC+08:00) Beijing,

Level	Rule	Condition	Value	Result
			Hong Kong, Urumqi)	Chongqing, Hong Kong, Urumqi)
		After	2015-02-10 16:40:00 (UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi)	Searches for the item whose send time is later than 2015-02-10 16:40:00 (UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi)

8. After adding multiple criteria, you can change the logical relationship between them by clicking the logic icon after the criteria. There are two logics now: **And** and **Or**. The default logic is **And**.

    - **And** – The content that meets all the criteria will be filtered to be included.
    - **Or** – The content that meets at least one of the criteria will be filtered to be included.

    Under the **Basic Filter Condition** tab, you can view the logical relationship of the criteria.

9. Click **Search** to execute the search operation. The search results display under the **Search Results** tab. View the search results in **Tree View** or **List View** by clicking the corresponding icons under the **Search Results** tab.

Appendix C: Unsupported SharePoint Online Data Types

The following table lists the SharePoint Online data types that are unsupported in DocAve Online Archiver, Content Manager, Deployment Manager, Replicator, and Granular Backup and Restore.

Unsupported SharePoint Online Data Types	
SharePoint admin center (Office 365 tenant level settings)	Infopath Settings (infopath)
	User Profile Service Settings (user profiles)
	Business Connectivity Service Settings (bcs)
	Records Management Settings (records management)
	Search Administration Settings (search)
	Secure Store Target Applications (secure store)
SharePoint Online Alerts	My alerts on this site
Column	External Data
List/Library Settings	Information management policy settings
	Access View
Site Collection Administration	The contents of Recycle bin
	Search Result Sources
	Search Result Types
	Search Query Rules
	Search Schema
	Site Collection audit settings
	HTML Field Security
Site Mailbox	The contents of Site Mailbox
Site Settings	Language settings
	User alerts
	Result Sources
	Result Types
	Schema

Appendix D: Functional Limitations

Database Type	Storage Limit	Size of Database Entries (Estimate)	Database Management Best Practices	Type of Entries Stored in Database
Control database	Unlimited	Plan data (each plan is 200 KB) Job data (varies depending on complexity of job)	For day-to-day management, users can delete job data from the GUI interface for convenience. Users can also export job data for record keeping purposes before deleting them from the DocAve Online solution.	Plans, jobs, Office 365 sites, mailboxes, and all configuration settings
Auditor database	1 GB	1-2 million audit records	Users can prune and export the Auditor database. They can export data and delete the data to free up space in the database. The size of the audit collection database can be managed via the configurable collection policies within Report Center.	All collected SharePoint Online audit events
Policy Enforcer database	1 GB	Approximately 300,000 out of policy event records	Users can prune the Policy Enforcer database. They may configure how long to keep data (at most a month), and any expired data will be pruned automatically. Users cannot export the Policy Enforcer database. DocAve Online may offer export functionality in the future. Due to the nature of the Policy enforcer feature, it is assumed that as out of policy events are resolved, they will be removed from this database.	Out of policy event records. Associated rule and profile information.

***Note**: The size of the default storage policy is set by the following formula: **55 GB + 1 GB*user count**. For example, if you have paid for 100 users, DocAve Online will provide you **155 GB (=55 GB + 1 GB*100)** free storage space. The free storage space provided for trial users is 5

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